

**South Portland-Cape Elizabeth Rotary Club**  
**Strategic Plan Draft Submitted to Board of Directors**  
**August 25, 2023**

**EXECUTIVE SUMMARY**

The South Portland-Cape Elizabeth Rotary Club is developing a strategic plan for 2023 to 2026. Following is a draft plan developed by the Strategic Planning Committee (SPC) over the period of April to August 2023. SPC developed this draft based on information derived from survey and in-person input from SPCE Club members. The draft is organized into twelve sections and includes 65 recommendations.

The Board will use this plan as a basis for developing priorities for the Club and its members over the next three years.

SPC members stand ready to assist the Board in further work on the 2023-26 strategic plan as needed.

Respectfully submitted,

Strategic Planning Committee members:

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## SPCE Rotary Club Strategic Plan 2023-2026

### INTRODUCTION

The South Portland-Cape Elizabeth Club (SPCE) has started the process of developing an updated strategic plan for 2023 to 2026. A Strategic Planning Committee (SPC) has been formed to work on a long-term plan for board review and implementation.

As first steps, Club members participated in two exercises.

**First**, a **Rotary Vision Questionnaire (RVQ)** was emailed in March 2023 to all Club members. The RVQ was designed to elicit from members how they perceived the SPCE Club presently functions in 2023. The RVQ covered:

*Ten Areas of Club Life (per RVQ):*

1. Membership
2. Leadership development
3. Public image and public relations
4. Club service
5. Vocational service
6. Community service
7. Youth service
8. International service
9. The Rotary Foundation
10. Fundraising

Each segment of the RVQ covered five assigned characteristics. Respondents were asked to rate each characteristic as it applied to SPCE as Strongly Disagree, Somewhat Disagree, Neither Agree or Disagree, Somewhat Agree, or Strongly Agree.

**Second**, on April 1, 2023, thirty Club members met to participate in a **Visioning Event (VE)** facilitated by the Rotary District 7780 visioning team. The purpose was to focus Club members on imagining (i.e., “visioning”) how the Club should look and function in 2026, three years from now.

Facilitators introduced thirteen areas of Club identity/function and captured attendees’ responses. 184 responses covered what Club members feel the Club will have already accomplished or will be working on by/in 2026. The responses were organized on wall charts representing the 13 areas of Club life.

Using a two-step voting exercise (with colored adhesive dots), attendees then identified which responses they felt were the most important in each area. Lower rated responses were eliminated in the first vote and then a second round of dot “voting” ensued. In this way, higher priority (i.e., “high dot”) responses were identified as priorities for the Club to work on. Responses ranged from specific and defined goals to vaguer sentiments.

*Thirteen Areas of Club Function/Activity (per VE):*

1. What does your Club stand for in your community? (Mission/public image)
2. Membership—club size
3. Membership—recruiting
4. Membership—retention
5. Club service
6. Vocational service
7. Community service projects
8. Youth Service
9. International service
10. Fundraising
11. Foundation success
12. Public image and public relations
13. Leadership development

Both the RVQ data collected and the VE vision laid out by Club members will be used to help develop a three-year strategic plan for the Club.

## **COMMITTEE PROCESS**

Since April 17, 2023, the Strategic Planning Committee (SPC) has met to:

- review the visioning data (RVQ and VE)
- review current Club structure including responsibilities of Club officers, directors, and committees/groups
- draft a Club mission statement
- identify areas that are working well and areas that need attention
- make recommendations to the Club board, and
- create a short term and long term (by 2026) action plan.

The committee prioritized strategic plan items based on RVQ (Rotary Vision Questionnaire) and VE (Visioning Event) data gleaned directly from Club members.

**RVQ responses** (from the Rotary Visioning Questionnaire of March 2023) reflect Club members' perceptions of ***current Club health and identity***. Survey responses are rated on a 1 to 5 scale (5 = best) by respondents. Any item with a weighted average response of **4.0 or above is considered a strength** and something that should be continued. Any item with a weighted average response of **3.0 or lower is considered a weakness or something that the Club needs to examine/work on**.

**VE responses** (from the in-person Visioning Event of April 1, 2023) indicate club members' ideas of ***how the Club should look like (their "visions") in 2026***. The responses from the 30 attendees include ideas/suggestions on programs, values, and characteristics. **Any priority identified by the attendees that received 10 or more green dots (from the final round of voting) is considered a priority** for SPC to review/work on. The Strategic Planning Committee has looked at these priority (i.e., "high dot") VE responses, and has added them into the current/proposed organizational structure of the Club. This process was used in order to assist the Board in 1) addressing priorities for further study and action, 2) who should be tasked with tackling the priorities, and 3) time frames for doing so.

In each area of service/function, the identified strengths should be continued. The areas identified as needing attention should receive new focus and work to achieve during the next three years.

(Refer to **Exhibits I and II** at the end of this planning document to see all the RVQ and VE responses and the "scores" of the responses from Club members.)

## **COMMITTEE RECOMMENDATIONS TO THE BOARD**

### **1. Club Mission Statement**

SPC recommends the following mission statement for the Club:

“Volunteers making positive changes for the common good through community and international service while making new friends.”

## 2. Existing and Proposed Organizational Structure

SPC recommends that the Club revise the existing functional organizational structure as a way to:

- organize strategic plan recommendations, and
- distribute responsibility for implementing recommendations arising from the RVQ and VE data.

This structure will best allow the strategic plan to be implemented.

See **Exhibit III** at the end of this document for an outline of the current club structure with the proposed additional committees.

### 3. Club Service

#### Role of the Club Service Director:

1. Provide for the physical space and the safe operation of Club meetings
2. Provide electronic access for offsite participation
3. Oversee provision of food service when required
4. Interact with various Club officers, committee chairs and members to ensure orderly functioning of Club activities
5. Report to the board
6. Groups that report to the Club Service Director:
  - a. Club history
  - b. Fellowship/Social Events
  - c. Speaker program
  - d. Club safety officer
  - e. Due diligence officer
  - f. Publicity and public relations

#### Data Scores:

##### RVQ Data:

##### *3 Strengths:*

1. We distribute a paper or electronic newsletter on a weekly basis to keep members informed. 5.00
2. Recreational and social activities are promoted by our club and supported by our members. 4.14
3. We conduct club assemblies that involve members in the planning process and keep them informed of the activities of Rotary. 4.21

##### *0 Need Attention*

##### VE Data:

1. Every Club member should be on at least one committee 19 dots
2. Have informal social events 17 dots
3. Have physical Rotary space owned by Club 13 dots

## Club Service Recommendations:

1. Build an engaging presence on social media

The committee strongly supports that our club increase its footprint on social media platforms with engaging content. The committee does not necessarily see the need to create a social media director; rather the Public Relations (PR) Committee should appoint a social media point person.

2. Improve communication with/among Club membership with Club “news”

As our club transforms with more members and more committees and groups the need for club transparency and “news” sharing will be the keystone for club stability. In addition, with our reduction in weekly meetings and offsite meeting participation the importance of informing the membership of club activities will be paramount.

This committee also feels that the board must make internal Club communication a priority goal. All methods of communication should be employed and supported. Identifying member preference for receiving communication would be helpful. Information regarding service opportunities, committee work, board minutes, community events, fundraising/budget data, and club distributions to various recipients should be published on a regular basis.

3. Study having a physical space owned by the Club

Attendees rated this response the third highest in Club Service. This response was generated as a way the Club could be more effective in the community with a permanent physical symbol and presence. A Rotary building could serve not only as a meeting place but also as a venue for other Club activities. Although this is bold vision it may be worthy of further study. Possible size, location, parking, kitchen facilities, purchase or lease, maintenance, and expenses would need to be evaluated. In addition, this would open the concept of renting the facility as well to be an income source

An initial study group should define the Club’s requirements and investigate the potential financial costs and manpower need from the membership. This would be an exploratory project with an initial report concluded in 3 to 5 years.

4. Increase the number of fellowship events to four per year.

5. Increase classification talks to bimonthly.

6. Incorporate an information table or tent at all Rotary events. Design specific promotional material for event.

7. Create a Caring Committee to monitor members’ special life events and to offer support where needed.



## 4. Community Service

### Role of the Community Service Director:

The Community Service Director handles Club charitable funding and project work in 3 major areas:

1. *Veterans*, making specific donations for housing, training, mental health, and special needs of veterans. There is also opportunity for hands on mentoring, coaching, and training while working with specific existing agencies.
2. *Community Outreach* has been limited mostly to financial donations for senior citizens' equipment to enhance their environment, Public Works recognition, maintenance of Bug Light and Fort Williams infrastructure, gardening to beautify South Portland and Cape Elizabeth parks, and financial and labor donations to the South Portland Food Cupboard and other similar organizations. Charitable Funding has also been provided for community projects, special events, special programs for mental health, housing, food insecurity, and other areas.
3. *Community Engagement*, donating time instead of dollars for worthy projects.

### Data Scores:

#### RVQ Data:

##### *3 Strengths:*

1. We develop and implement educational, humanitarian, and vocational projects that address local community needs. 4.50
2. Our club has a community service project that involves a large number of club members. 4.40
3. We have clear guidelines for donations/gift giving. 4.00

##### *1 Needs Attention:*

1. We have received a District Community Grant for a local project. 2.94

#### VE Data:

1. Ask community what they need 19 dots
2. Prioritize projects—choose those we do well and eliminate those we do not 19 dots
3. Annual plans and goals for each service area—elder, youth, community 11 dots
4. Continuing support for Food Cupboard and Judy's Pantry 11 dots
5. Fun and fellowship with community projects 10 dots

### **Community Service Recommendations:**

1. Expand community engagement by considering new “hands-on” opportunities to donate time instead of dollars. By doing so, Rotary gains additional exposure, and members have an opportunity to work together on service projects while building good will with the community and fellowship with each other. By working hands on, Club members become more tied to the need than by merely donating dollars that were raised elsewhere. In essence, this would increase engagement and perhaps would also be another way to develop vocational service and improve retention.
2. Develop a needs assessment tool to reach out to community groups to assess where Rotary might best help them financially or physically. By incorporating external input, we can do a better job of defining and addressing the most important needs in our community.
3. Feature and promote our past and future service projects. As a service organization we should measure our success by the quality of the service projects we are engaged in as well as our involvement with Rotary International service projects. These activities should be reviewed and evaluated for what has worked well. Featuring or promoting our service projects further identifies our Rotary Club. This work could be done in partnership with the Club History member in the Club Service area.
4. The board should maintain a list of all service projects the Club is active in. These service opportunities should be listed as either group or individual projects that the Club has vetted. The popularity or degree of Club participation in service projects should be tracked.
5. Create an active list of all potential service opportunities for both individual Club members and groups of Club members. Service areas will need to be vetted and put on an accessible platform. Tracking of participation would be needed.
6. Develop a tool/process to provide clear guidelines, priorities, and standards for projects/donations/gift giving.

## 5. Fundraising

SPCE has major strengths in the fundraising area. (See RVQ and VE data below.) The Club's internal budget and Happy Dollars are robust. The Club could, however, build on those strengths.

### Data Scores:

#### RVQ Data:

##### *5 Strengths:*

- |   |      |
|---|------|
| 1. Our club has fundraising plan.   | 4.54 |
| 2. Our club supports our annual fundraising events.                             | 4.61 |
| 3. Our club has a granting or giving process.                                   | 4.05 |
| 4. Membership in our club understand and support what our fundraising focus is. | 4.17 |
| 5. Our club dues/operations budget and club fundraising/gifting are separated.  | 4.39 |

##### *0 Need Attention*

#### VE Data:

- |  |         |
|--|---------|
| 1. SpringFest goal of \$100K revenue                                       | 20 dots |
| 2. Christmas tree sale goal of \$60K net revenue                           | 17 dots |
| 3. PumpkinFest event goal of \$50K net revenue                             | 17 dots |
| 4. Create an open water event (clean water) with goal of \$20K net revenue | 10 dots |

### **Fundraising Recommendations:**

1. Improve the process for granting and giving (see Community Service recommendations.)
2. The Club should evaluate the potential of another fundraiser, recognizing any possible future conflicts/issues. Additionally, the Club should determine how much fundraising is appropriate and required to achieve service goals, while also factoring in the available person power needed to raise those funds.
3. Study the current and potential uses, effectiveness, and utility of a Rotary food truck or van.

## 6. International Service

### Data Scores:

#### RVQ Data:

##### *1 Strength:*

1. Our club has participated in the eradication of polio worldwide. 4.81

##### *1 Needs Attention:*

1. Our club participates in activities such as recruitment, programming, or housing for International Vocational/Cultural Exchange team members (formerly Group Study Exchange.) 2.80

#### VE Data:

1. Increase support for Wabanaki/tribal communities in ME and Canada 19 dots
2. Develop sibling relationship with another international Rotary. Suggestion: Dhaka Mavericks Club in Bangladesh 16 dots
3. Aligning activities/priorities with communities living here 15 dots
4. Established international project. We initiate the project. 14 dots

### **International Service Recommendations:**

1. Club members should partner with and contribute to international projects and initiatives, including those relating to the Wabanaki Confederacy.
2. At least one International Service committee member should participate in the next District Outreach Initiative.
3. The International Service area should investigate and, where appropriate, submit to the board proposals for Global Grants or other projects developed by other clubs.
4. The International Service area should investigate developing a Global Grant project as the initiating club.
5. Continue to support the Foundation, but focus other financial contributions on projects aligned with communities present in the Greater Portland area.
6. Investigate a partnership/sibling relationship with a Rotary club in another country initially through participation in the Rotary Friendship Program or similar program.
7. Explore the expansion of the Youth Exchange Program to include the yearlong program and to work with the Youth Service Director to generate interest in the Program.

## 7. Leadership Development

### Role of the Nominating Committee:

The Nominating Committee members (see Immediate Past President section under Recommendation #2) play a direct role in leadership development by recruiting the Club's future leaders. Historically many Club officers have gone on to become the highest officers in the District and Rotary International. Our club leaders work together well and attend District trainings.

One area of concern appears to be the Club's ability to cultivate new officers and leaders. Growing them internally through experiences within committees theoretically makes sense.

SPC recognizes the constraints (time, social, family, and vocation) to a member's ability to serve in leadership roles. However, the need is real and continues to exist as we fill the specific roles in our succession plan.

Visioning responses in the areas of leadership, membership, and other categories all touch on the work of the Nominating Committee. There were no specific questions or data directly related to the Nominating Committee but extrapolation of its role in the area of leadership development is affected by other visioning categories.

### Data Scores:

#### RVQ Data:

##### *3 Strengths:*

- |  |      |
|--|------|
| 1. Our club develops leaders capable of serving in Rotary beyond the club level.                                       | 4.43 |
| 2. Our club leaders attend district training events.   | 4.59 |
| 3. Our club President-Elect, President, and Immediate Past President work together to ensure continuity of leadership. | 4.60 |

##### *0 Need Attention*

#### VE Data:

- |   |         |
|---|---------|
| 1. Robust profile of Club members   | 20 dots |
| 2. Two tracks for members: 1) leadership and 2) remain Rotarian active member | 18 dots |
| 3. Better education/job description of each Club role                         | 15 dots |

### **Leadership Development Recommendations:**

The VE visioning in-person responses (“dots”) give further data on how to develop succession plans. Club members could benefit from efforts to:

1. Integrate new members via required service on at least one committee.
2. Increase efforts to educate new members about Rotary.
3. Reinstitute the new member mentoring program.
4. Have more classification talks.
5. Emphasize the value and experience of serving as a Club officer or board member.
6. Develop robust profiles of members.
7. Better define and publicize the roles and expectations of members.
8. Decouple the Christmas tree sale operation from the President-Elect’s role. Often the tree sale role/requirement is the biggest hurdle or disincentive for members interested in Club leadership. Leadership and execution of the sale should be assigned to the Christmas Tree Committee with a separate person (not necessarily interested in becoming President) in charge.

Note: Historically this Club has not needed to have repeat presidents. We have a shared leadership organization and members need to be educated as to how we develop future leaders. Although not specifically addressed in the visioning process, leadership development and succession management remain a challenge. There may come a time when it will be necessary to recruit future Presidents from interested Past Presidents.

## 8. Membership

### Data Scores:

#### RVQ Data:

##### *1 Strength:*

1. Our members are made to feel welcome. Camaraderie is a hallmark of our club. 4.40

##### *2 Need Attention:*

1. Orientation is consistently and regularly provided for new members. 2.63
2. We ensure that every member is active in a club project or function. 2.78

#### VE Data:

##### *Membership Attributes*

1. Members want wider demographics by 2026. 14 dots
2. All members should be actively engaged in service projects. 10 dots

##### *Recruiting*

3. The Club should have speakers/programs to invite community members to attend. 17 dots

##### *Retention*

4. Onboarding and follow-up should be in place. 16 dots
5. Social activities (non-fundraisers) on a regular basis 10 dots

##### *Club Size*

1. VE data shows that members want the Club to have 75 to 80 people (11 dots) to 81 to 91 people (9 dots).

### **Membership Recommendations:**

The Club needs to develop a comprehensive plan for the recruitment and retention of members. SPC recommends:

1. Two committees, 1) Membership Recruitment and 2) Member Engagement and Mentoring, should report to the Membership Director.
2. The Recruitment Committee should be expanded to include at least four members, including newer members. They should develop a plan, using social media, events, and other methods, to broaden outreach to a more diverse group of potential members. New members must be vetted before they join the Club.

3. The Engagement and Mentoring Committee should be responsible for engaging new members before and after they join the Club. A member of E&M would meet with each prospective member and their sponsor prior to application to explain the goals of Rotary and the benefits and responsibilities of being in our Club and to determine whether to recommend acceptance to the Board. After a member is accepted, they would be assigned an experienced Rotarian (who could be the sponsor or a member of Engagement) as a mentor.
4. Assigned mentors will guide/encourage/shepherd the new members as they join and acclimate to the Club. Mentors must meet regularly with each of their assigned new members during the new member's first three to five years with the Club. This mentorship relationship will help each new member remain engaged and address any potential problems.
5. Develop an onboarding outline to provide guidelines of how to acclimate new members as they join the Club.
6. Each new member must submit a detailed biography to be available to all Club members.
7. Each new member must be required to participate in all major fundraisers in some capacity.
8. Each new member must be required to join at least one committee.
9. Each new member must be strongly encouraged to attend as many Club meetings as possible.
10. Continue hybrid meetings. This response was highly supported by VE attendees. The Club came out of the pandemic complete lockdown environment and initiated hybrid meetings. Hybrid meetings allow members to participate if they are ill or recuperating from illness or injury. In addition, such meetings allow for regular attendance from members who are geographically distant from our local community.
11. Institute a Caring Committee to address the life events of members—a group whose sole charge is to reach out to members experiencing trouble(s) and needing support. This group would offer a listening ear and offer the Club's assistance if possible. Although the Club newsletter currently notes members' birthdays, anniversaries and other such highlights, the Club should form a group that checks in on members experiencing difficult life events or experiences (family deaths, illnesses, or injuries). This keeping in touch and personal reaching out should promote a sense of mutual benefit. This would establish a more tangible sense of family within the membership.
12. The Club should strive to have 80 members by 2026.



## 9. Public Image and Public Relations

### Data Scores:

#### RVQ Data:

##### *5 Strengths:*

1. Our club activities are routinely represented in the media, TV, radio and/or newspaper. 4.43
2. Information about our club is posted on our website and/or social media sites. 4.80
3. We constantly promote the club's service projects and activities. 4.51
4. Rotary symbols are prominent in our community. 4.03
5. We regularly provide the public with information about Rotary. 4.17

##### *0 Need Attention*

#### VE Data:

1. Membership table at all events with promo materials. Rotary Night at ball park. 19 dots
2. Social media content engaging and inviting to others to share content. Clearly defined channels and content. 15 dots
3. Revised website 11 dots
4. Consolidated Rotary food truck. Mobile advertising for events with Rotary bumper sticker. New and improved. 10 dots

### **Public Image and Public Relations Recommendations:**

1. Investigate the feasibility of adding new wording to the existing signs that would instruct readers to check the Club website for the current schedule and location of meetings. There are currently Rotary signs on Route 77 at the Spurwink bridge (Scarborough border), Route 77 across from the Cape Elizabeth IGA shopping center, and Route 77 southbound on the Casco Bay Bridge. Another sign should be placed on Route 1 northbound in South Portland at the Volvo dealership. The meeting date, time, and place portions of the signs were removed during the pandemic.
2. Revise the Club website. VE attendees wanted a revised website and greater social media content. The increasing amount of content being added onto the Club website along with current Club Runner software will dictate that some form of website revision will be required so that users can find content easily. Website revision is vital for effective club function and should be given a high priority.

3. Increase the Club's presence on social media. Having just the current presence on social media platforms will clearly be insufficient for the long-term goals of the Club to communicate effectively with the public. The Club needs to develop a greater, more robust presence with engaging content that invites others to share content.
4. Have a membership table and person at all events for distribution of Rotary promotional materials.
5. Increase the physical presence of Rotary at all events. VE responses indicated that members want to have the current food trailer replaced with a food truck. This vehicle would be painted with Rotary signage and would serve as a mobile advertisement for the Club. SPC did not address whether our current food trailer should be consolidated, replaced, or sold. At the heart of these responses was a desire for greater Rotary signage and symbols to be associated with our events.
6. Study the current and potential uses and utility of a Rotary food truck or van. (This is also a recommendation in the Fundraising section of this plan.)

## 10. Rotary Foundation

### Data Scores:

#### RVQ Data:

##### *4 Strengths:*

- |  |      |
|--|------|
| 1. We support the Rotary Foundation through participation in its programs.       | 4.49 |
| 2. Recognition of those who donate is timely.                                    | 4.47 |
| 3. Our club conducts programs—at least annually—featuring the Rotary Foundation. | 4.74 |
| 4. Our reporting systems are accurate.   | 4.57 |

##### *0 Need Attention*

#### VE Data:

- |   |         |
|---|---------|
| 1. Use Foundation points to recognize members and community members | 24 dots |
| 2. Originate or support environmental global grant.                 | 19 dots |
| 3. Foundation donations are voluntary.                              | 16 dots |

### **Rotary Foundation Recommendations:**

1. Based on Foundation Committee recommendations, use Foundation points to recognize Club and community members.
2. In conjunction with International Service and Community Service, originate (preferably) or support a Global Grant project/request.

Note: Our Club has not actively supported the Foundation's "Every Rotarian, Every Year" program in the past. This seems in line with members' desires (shown in the VE data) to have Foundation donations be voluntary.

## 11. Vocational Service

### Data Scores:

#### RVQ Data:

##### *1 Strength:*

1. Our club promotes the Four Way Test and high ethical standards in club and community. 4.56

##### *1 Needs Attention:*

1. Our club members participate in a “job shadow” or career awareness program for high school students. 1.74

#### VE Data:

1. Awards program to recognize all/more professions 21 dots
2. Reimagine scholarships to align with needs 18 dots
3. Visit SMCC vocational programs 15 dots

### **Vocational Service Recommendations:**

We currently have no Director for Vocational Service. This Avenue of Service has always been tough to define, at both the Club and District levels. Many members may not understand what value Rotary can have for student and adult professional development. Vocational Service encompasses work that can be done for students (via the Youth Services Director) and adult professionals (via the Community Service and Club Service Directors.)

Mentoring, interview training, speaking, leadership development, team building, and Rotary retention are all relevant to vocational service. Due to its complexity, work in this area could be postponed until projects in other areas are completed successfully.

In the meantime, SPC recommends:

1. Institute bi-monthly classification/vocation talks.
2. Continue the popular speaker’s program. Many speakers’ topics pertain to vocations.
3. Develop a community awards program for multiple professions. (This program would have tie-ins with the Foundation, Community Service, Public Relations and Public Visibility, Youth Services, and Membership recommendations.)
4. Work with Southern Maine Community College to realign scholarships. (This recommendation would tie in with the Youth Services and Membership areas.)
5. Investigate sponsoring internships (paid or not) at nonprofit organizations.

## 12. Youth Service

### Role of the Youth Service Director:

The Youth Service Director and the proposed Youth Service Committee operate with the help of two subcommittees:

1. Scholarships, an existing subcommittee, which does student interviews and allocates Club scholarship funds, and
2. Youth Engagement, a proposed subcommittee, which handles Rotaract, Interact, Rotary Youth Exchange, miscellaneous support for sports, the Boys and Girls Club (SPCE helped start it,) and other youth-oriented areas.

### Data Scores:

#### RVQ Data:

##### *1 Strength:*

1. Our club actively funds RYLA or other youth leadership program. 4.40

##### *1 Needs Attention:*

1. We support a mentoring program for students. 2.62

#### VE Data:

1. Expand scholarship programs for vocational careers and certificate programs, trades 24 dots
2. Partner with other organizations to support projects with alternate abilities students 18 dots
3. Collaborate with educators to connect with them and understand student abilities. What is reasonable bandwidth of students? 13 dots

### **Youth Services Recommendations:**

1. Establish/invigorate an Interact (or Rotaract Club in the future) in South Portland and/or Cape Elizabeth. The Youth Engagement subcommittee should focus immediately on this recommendation. Significant effort will be needed to establish Interact clubs.
2. Focus on reinvigorating RYLA participation in our local community and high schools. The Youth Engagement subcommittee should focus immediately on this recommendation.
3. Develop a policy for board approval that would okay RYLA participation for South Portland and Cape Elizabeth students that attend high schools other than South Portland High School and Cape Elizabeth High School.
4. Establish motivational/PR programs at local schools through programs like a dictionary project, essay contests, or scholarships.

5. Establish a mentoring program for students.
6. Involve young people/students in our community service projects.
7. Establish a Youth Engagement subcommittee to handle Rotaract, Interact, Rotary Youth Exchange, miscellaneous support for sports, the Boys and Girls Club (SPCE helped start it), and other mentoring, engagement, leadership development, team building, and other youth-oriented activities.

## Exhibit I

### **3/2023 Rotary Visioning Questionnaire (RVQ) Responses with Weaknesses (3.0 and under) & Strengths (4.0 and over) per 5-Point Scale**

#### **Membership:**

We maintain a comprehensive plan for recruitment and retention of members. 3.23

Orientation is consistently and regularly provided for new members. 2.63

We ensure that every member is active in a club project or function. 2.78

Our members are made to feel welcome... Camaraderie is a hallmark of our club. 4.40

Our club seeks diversity. 3.14

#### **Club Service**

Our club's operations are managed effectively, including the filling of committee vacancies appointing committee chairs, and conducting planning meetings prior to the start of each Rotary year. 3.91

We maintain clear communications among the club president, board, committee chairs, and members. 3.95

Recreational and social activities are promoted by our club and supported by our members. 4.14

We conduct club assemblies that involve members in the planning process and keep them informed of the activities of Rotary. 4.21

We distribute a paper or electronic newsletter on a weekly basis to keep members informed. 5.0

#### **Vocational Service**

Our club has a good understanding of vocational service and its value to the communities we serve. 3.79

Our club members give classification talks to promote their vocations. 3.75

Our club members participate in a "job shadow" or career awareness program for high school students. 1.74

We have projects that use the vocational expertise of our members. 3.40

Our club promotes the Four Way Test and high ethical standards in club and community. 4.56

## Community Service

We develop and implement educational, humanitarian, and vocational projects that address local community needs. 4.50

We have a process for identifying community needs that could lead to club projects. 3.81

We have received a District Community Grant for a local project. 2.94

Our club has a community service project that involves a large number of club members. 4.40

We have clear guidelines for donations/gift giving. 4.00

## Youth Service

Our club has a plan to work with/establish an Interact or Rotaract Club. 3.29

Our club's connection to local schools is positive (through programs such as a dictionary project, essay contests or scholarships). 3.74

We support a mentoring program for students. 2.62

Our club actively funds RYLA or other youth leadership program. 4.40

We involve young people in our service projects. 3.53

## International Service

Our club has participated in the eradication of Polio worldwide. 4.81

We develop and implement educational, humanitarian and vocational projects that address the needs of communities in other countries. 3.41

We regularly have Youth Exchange Students sponsored by our club. 3.03

Our club strives to be involved in Global Grants. 3.10

Our club participates in activities such as recruitment, programming, or housing for International Vocational/Cultural Exchange team members (formerly Group Study Exchange). 2.80



## **Fundraising**

Our club has a fundraising plan. 4.54  
Our club supports our annual fundraising events. 4.61  
Our club has a granting or giving process. 4.05  
Membership in our club understands and supports what our fundraising focus is. 4.17  
Our club dues/operations budget and club fundraising/ gifting are separated. 4.39

## **The Rotary Foundation**

We support The Rotary Foundation through participation in its programs. 4.49  
Our club supports the "Every Rotarian, Every Year" campaign. 3.63  
Recognition of those who donate is timely. 4.47  
Our club conducts programs - at least annually - featuring The Rotary Foundation. 4.74  
Our reporting systems are accurate. 4.57

## **Public Image & Public Relations**

Our club activities are routinely represented in the media, TV, radio and/or newspaper. 4.43  
Information about our club is posted on our website and/or social media sites. 4.80  
We constantly promote the club's service projects and activities. 4.51  
Rotary symbols are prominent in our community. 4.03  
We regularly provide the public with information about Rotary. 4.17

## Leadership Development

Our club develops leaders capable of serving in Rotary beyond the club level. 4.43

Our club leaders attend district training events. 4.59

Our club president-elect, president, and immediate past president work together to ensure continuity of leadership. 4.60

We provide for continuity in leadership by making sure committee chairs have previous experience as member of the committee. 3.46

Our club committee chairs attend the district assembly prior to serving as a chair. 3.08

## Will you be participating in the Club Visioning Event for your Club?

Answer Choices	Responses	
Yes	59.52%	25
No	9.52%	4
I'm not sure	30.95%	13
<b>Answered</b>		<b>42</b>
<b>Skipped</b>		<b>3</b>

## How many years have you been member of your current Rotary Club?

Answer Choices	Responses	
less than one year	7.14%	3
1-3 years	23.81%	10
3-6 years	11.90%	5
7-10 years	14.29%	6
10-15 years	16.67%	7
more than 15 years	26.19%	11
<b>Answered</b>		<b>42</b>
<b>Skipped</b>		<b>3</b>

Note:

**Weaknesses** are 3.0 and under weighted average responses & **Strengths** are 4.0 and over weighted average responses on survey's 5-point scale.

**Exhibit II**

**4/1/23 Visioning Event (VE) Top Priorities for 2026 Vision Chosen by the 30 Attendees**  
**(as measured by second round green wall dots)**

Note: Items listed below received 10 or more green dots; i.e., one third or more of the 30 attendees prioritized the item.

<b>A. Vision Pursued (what does your Club stand for in your community?)</b>	
1. Cool doers in community. Open and inclusive to reflect community	24 dots
2. Vibrant, inter-connected, service-oriented, kinder, peaceful and more equitable world	21
3. Agents of change to address difficult community needs	18
<b>B. Membership—Club Size</b>	
1. 75-80 people	11
2. 81-91 people	9
<b>Membership—Attributes</b> (characteristics, features, or demographics)	
1. Wider demographics	14
2. All actively engaged in service projects	10
<b>Membership—Recruiting</b>	
1. Speakers/programs to invite community members to attend	17
<b>Membership—Retention</b>	
1. Onboarding and follow-up	16
2. Social activities (non-fundraisers) on a regular basis	10
<b>C. Club Service</b>	
1. Every Club member on at least one committee	19
2. Informal social events	17
3. Have physical Rotary space owned by Club	13
<b>D. Vocational Service</b>	
1. Awards program to recognize all/more professions	21
2. Reimagine scholarships to align with needs	18
3. Visit SMCC vocational programs	15
<b>E. Community Service Projects</b>	
1. Ask community what they need	19
2. Prioritize projects—choose those we do well and eliminate those we do not	19
3. Annual plans and goals for each service area—elder, youth, community	11
4. Continuing support for Food Cupboard and Judy’s Pantry	11
5. Fun and fellowship with community projects	10

<b>F. Youth Service</b>	
1. Expand scholarship programs for vocational careers and certificate programs, trades	24
2. Partner with other organizations to support projects with alternate abilities students	18
3. Collaborate with educators to connect with them and understand student abilities. What is reasonable bandwidth of students?	13
<b>G. International Service</b>	
1. Increase support for Wabanaki/tribal communities in ME & Canada	19
2. Develop sibling relationship with another international Rotary. Suggestion: Dhaka Mavericks Club in Bangladesh	16
3. Aligning activities/priorities with communities living here	15
4. Established international project. We initiate the project.	14
<b>H. Fundraising</b>	
1. SpringFest \$100K revenue	20
2. Christmas tree sale \$60K net revenue	17
3. PumpkinFest \$50K net revenue	17
4. Create open water event (clean water) \$20K net revenue	10
<b>I. Foundation Success</b>	
1. Use Foundation points to recognize members and community members	24
2. Originate or support environmental global grant	19
3. Foundation donations are voluntary	16
<b>J. Public Image and Public Relations</b>	
1. Membership table at all events with promo materials. Rotary Night at ball park.	19
2. Social media content engaging and inviting to others to share content. Clearly defined channels and content.	15
3. Revised website	11
4. Consolidated Rotary food truck. Mobile advertising for events with Rotary bumper sticker. New and improved.	10
<b>K. Leadership Development</b>	
1. Robust profile of Club members	20
2. Two tracks for members: 1) leadership, 2) remain Rotarian active member	18
3. Better education/job description of each Club role	15

**Exhibit III**

**Outline of Current Club Structure with Proposed Additional Committees**

(Descriptions of committees are on the Club website)

1. **President** (existing)

2. **President-Elect** (existing)

a. Christmas Tree Committee (existing)

This committee, chaired by the President-Elect, helps to plan and execute the annual tree sale. Interested Club members are encouraged to join. All functions of the sale are represented: publicity, lot set up, technology, sponsorship, volunteer signup, and much more. Members choose to help as they can, within their comfort level.

3. **Vice President** (existing)

The major duty of the Club VP is to oversee Club fundraisers other than the Christmas Tree Sale.

a. SpringFest Committee (existing)

b. Community Events/Fundraisers Committee (proposed)

1) Theater Night

2) Art in the Park

3) Cape Family Fun Day

4. **Immediate Past President** (existing, per bylaws)

a. Nominating Committee (existing, per Club bylaws)

Chaired by the Immediate Past President, this committee's other members are the previous four Past Presidents. Membership rotates annually; one member leaves and the new Immediate Past President becomes the new chair. The primary function of this group is to provide Club membership with a recommended slate of officers to be voted on by members per the bylaws.

5. **Club Service Director** (existing) and Club Service Committee

- a. Fellowship Committee (proposed)
  - i. Lobster bake
  - ii. Social events
  - iii. Changeover night
- b. Speaker's Program Chair (existing)
- c. Publicity and Visibility Committee (proposed)
  - i. Print
  - ii. Photography
  - iii. Social media
  - iv. Website
  - v. Advertisement
- d. Club safety officer (existing)
- e. Due diligence officer (existing)
- f. DEI Group (proposed)

6. **Community Service Director** (existing) and Community Service Committee

- a. Veterans Committee (existing)
- b. Community Outreach Committee (proposed)
  - i. Seniors
  - ii. Public Works recognition
  - iii. Bug Light
  - iv. Gardening Committee (existing)
  - v. Food Cupboard
  - vi. Others to be added (proposed)

7. **Finance Committee** (existing)

The Finance Committee is comprised of volunteers. Membership is open to all interested members with or without financial sector experience. The Club Treasurer, Club Secretary (internal budget), and Past President are encouraged to serve. The intent is to meet at least quarterly during the Rotary year to observe, ratify, and make recommendations on the financial processes and legal requirements of the Club. The Chair comes from the Committee.

Functions of the Finance Committee:

1. Oversee the overall financial status of the Club
2. Assist the President-Elect to formulate budgets
3. Review the current year's quarterly reports
4. Prepare a written year-end annual report
5. Advise on new initiatives
6. Oversee investments and bylaw requirements
7. Recommend changes to financial plans if needed
8. Advise and assist when questions arise
9. Monitor use of unrestricted fund balances

8. **International Service Director** (existing) and International Service Committee

- a. Rotary Foundation Committee (existing)
- b. Exchanges
- c. International Projects

9. **Membership Director** (existing)

- a. Recruitment Group (proposed)
- b. Mentor and Engagement Group (proposed)

10. **Strategic Planning Committee** (existing)

11. **Youth Services Director** (existing) and Youth Service Committee

- a. Scholarship Committee (existing)
- b. Youth Engagement Group (proposed)
  - i. Interact (high school Rotary Clubs)
  - ii. RYLA (Rotary Youth Leadership Awards)
  - iii. Rotary Youth Exchange
  - iv. Rotaract (college and community clubs for young adults to age 30)

12. **Club Treasurer** (existing)

13. **Club Secretary** (existing)