

# 2021 Strategic Plan



## **Mission Statement**

The Rotary Club of Beaumont, TX, is a large and diverse fellowship of inspired business, professional, and civic leaders with significant community connections that foster the ideals of Service Above Self and high ethical standards.

## **RI People of Action Vision Statement Areas**

To fulfill its mission, the Rotary Club of Beaumont aligns its strategies with Rotary International's Vision Statement:

- Increase impact
- Expand reach
- Enhance participant engagement
- Increase ability to adapt

## **People of Action Vision Goal Drafts**

To fulfill its Mission and align its strategies with RI's People of Action Vision, The Rotary Club of Beaumont focuses on the following goals:

- Identify and solve important problems, utilizing the expertise of community leaders in the Club, to make a significant impact in Southeast Texas
  - Examples: Centennial Playground, annual Layette Project, Summer Reading Gap book project, Cardinal NEST project, Sleep in Heavenly Peace project
- Define and communicate the Club's value to attract and serve members and our community and world
  - Examples: international activities (Ambassadorial Scholars, study abroad, exchange students, Polio initiatives), 100 Black Men of Beaumont collaboration, Vocational Excellence Awards, Interact and Rotaract Clubs
- Create new and unique opportunities for our members to work together in community service, grow as business leaders, and develop personal and professional networks
  - Examples: T. Kelsey Lamb Ethics Award, upcoming Rotary Leadership Institute trainings, hosted 2013 Large Club Conference, high quality weekly meeting guest speakers, involvement in RYLA, Rotary Flag project, hosting District 5910 District Conferences
- Continuously evaluate our projects and procedures to adapt to our members' and our community's needs
  - Examples: local/regional hurricane recovery efforts, COVID hybrid meetings, formalized new initiatives from past responses, bi-weekly Executive Officers' meeting

## **Strategies**

To achieve its goals, The Rotary Club of Beaumont acts on the following strategies. Immediate Initiatives represent the Club's strategic focus over the next 1-2 years, while Future Initiatives will be evaluated and enacted beyond that period.

### **Identify and solve important problems, utilizing the expertise of community leaders in the Club, to make a significant impact in Southeast Texas**

#### *Immediate Initiatives*

- Create a long-term plan for increasing regularity of smaller community service projects, multi-year larger projects, and Rotary presence at community events
  - Service Lane Committees
- Finalize goals and actions for 100 Black Men of Beaumont collaboration
  - Special Committee

#### *Future Initiatives*

- Develop program for long-term involvement in BISD and local collegiate education initiatives
  - Special Task Force (include reps from BISD)

### **Define and communicate the Club's value to attract and serve members and our community and world**

#### *Immediate Initiatives*

- Clarify the value of a Rotary membership *from the perspective of a prospective member's needs/desires*
  - Membership Recruitment Committee
- Create a clear value statement/differentiation statement to explain how Rotary is unique among other clubs/organizations in SETX
  - Membership Recruitment and Public Relations Committees
- Develop member and prospective member segmentation groups for targeted recruitment and retention efforts
  - Membership Recruitment and Retention Committees
- Establish baselines and targets for increased and diversified member recruitment (demographic diversity, classification strategic holes, growth industry recruitment)
  - Membership Recruitment and Retention Committees
- Generate a list of 50-100 prospective members and a recruitment strategy involving current members inviting them as guests toward membership
  - Membership Recruitment and Public Relations Committees
- Promote networking for business success as a tool to attract prospective members
  - Membership Recruitment and Public Relations Committees
- Codify Club activities directed at member retention and development
  - Membership Recruitment and Retention Committees
- Implement an external marketing campaign, beyond Facebook, to prospective members and the Beaumont community to "tell the story" of the Rotary Club in our community

- Develop and implement 2021-22 promotional schedule to tell our story and communicate our community impact
  - Public Relations Committee
- Identify and build a series of video or photo “testimonials” around why I joined and remain in Rotary (focus on 3-5 main value areas, consider email blasts with these to promote service projects)
  - Membership Retention Committee
- Hold a Membership Drive “brainstorming” session and short educational program on recruitment during a regular Club meeting to generate ideas of and campaign to prospective members
  - Membership Recruitment, Internal Communications, and Programs Committees
- Increase number of small/medium-sized business owners/leaders in Club
  - Membership Recruitment and Retention Committees
- Increase peer-to-peer marketing to prospective members (i.e. banker to banker)
  - Membership Recruitment and Retention Committees
- Develop joint program to recruit prospective members with SETX YPO/40 Under 40, Interact, and Rotaract programs
  - Membership Recruitment Committee
- Develop strategies to re-engage members who disengaged during 2020
  - Membership Retention Committee
- Develop “expectations” for in-person participation for new members
  - Membership Recruitment and Retention Committees

#### *Future Initiatives*

- Implement strategies to enhance the guest attendee experience and to educate club members on the strategic use of guest attendee invitations toward new memberships
  - Create the fundamentals of a simple “elevator pitch” for recruiting new members
    - Membership Recruitment Committee
  - Survey guest attendees about what would enhance their guest experience, lead to joining the club
    - Membership Recruitment and Club Service Committees
- Increase club member engagement with new and prospective members to demonstrate professional network value of membership
  - Membership Retention Committee

### **Create new and unique opportunities for our members to work together in community service, grow as business leaders, and develop personal and professional networks**

#### *Immediate Initiatives*

- Implement an internal marketing campaign to current members about the value of their Rotary membership and involvement in the club

- Address misconceptions about dues, attendance policies, and involvement opportunities
  - Revenue and Membership Retention Committee
- Consider a more substantial marketing committee (or a charge that includes internal marketing)
  - Board of Directors
- Identify and build a series of video or photo “testimonials” around why I participate in service projects and the impact of the projects
  - Service Lane Committees
- Develop marketing activities around upcoming club meetings and speakers
  - Program and Public Relations Committees
- Increase opportunities for 1:1 personal connections that create personal accountability for participation in club activities and meetings
  - Membership Retention Committee
- Develop a program to prepare Club members for future Club leadership positions/opportunities
  - Strategic Planning and Past Presidents Committees

#### *Future Initiatives*

- Resume Rotary Masters and Doctorate programs
  - Membership Retention Committee
- Identify \_\_x#\_\_ projects in which to involve prospective Rotarians for the 2021-22 Rotary year (Consider involvement targets for re-engaging disengaged existing members)
  - Service Lane Committees, Board of Directors
- Using the RI Learning Center as a reference, review annually new member orientations as a vital step in the membership and retention process
  - President-Elect and Membership Recruitment and Retention Committees
- Develop specific targets for increased club member participation in District 5910 activities
  - Fellowship Committee

### **Continuously evaluate our projects and procedures to adapt to our members’ and our community’s needs**

#### *Immediate Initiatives*

- Evaluate charges, functions, structures, and reporting processes for all Club committees
  - Strategic Planning Committee and Board of Directors
- Establish multi-year, strategic membership on the Membership Recruitment and Retention Committee
  - President, President-Elect, Membership Recruitment Chair
- Utilize strategic plan to increase continuity from one Rotary year/President to the next
  - President, President-Elect, President-Nominee, Past Presidents, Strategic Planning Committees
- Develop post-COVID hybrid meeting strategy

- Programs and Fiscal Committees
- Secure \_\_X#\_\_ guest speakers outside SETX utilizing hybrid format
  - Programs Committee
- Develop office management succession plan for Executive Director redundancies
  - Strategic Planning Committee and Board of Directors

*Future Initiatives*

- Revise charge and engagement plan for Past Presidents' Council
  - Ad-hoc committee of Past Presidents
- Evaluate status of current Club member classifications
  - Classifications and Membership Recruitment Committees
- Develop recommendations on new membership tiers/categories, satellite club opportunities, and similar unique/new membership opportunities
  - Finance and Strategic Planning Committees

### **Strategic Plan Communications Suggestions**

- Define what achieving initiatives in this plan means for the community, our Club, and individual members
- President and President-Elect develop a roll-out plan
  - How are Board meetings and reports changing?
  - How will Board agendas be structured around strategic plan initiatives
  - Strategic Plan Chair communicate expectations of committee work and upcoming reports at monthly Board meetings
  - Develop a reporting mechanism to share strategic plan progress with Club members
- Consider a quarterly(?) Wednesday Club Assembly to report and work on the “health and strategy of the Club”

## Strategy Assignments by Committee

### *Service Lane*

**Identify and solve important problems, utilizing the expertise of community leaders in the Club, to make a significant impact in Southeast Texas**

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  - Service Lane Committees

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*Special or Ad Hoc Committees*

**Identify and solve important problems, utilizing the expertise of community leaders in the Club, to make a significant impact in Southeast Texas**

- Finalize goals and actions for 100 Black Men of Beaumont collaboration
  - Special Committee

AD  
HOC



## *Public Relations Committee*

### **Define and communicate the Club's value to attract and serve members and our community and world**

- Create a clear value statement/differentiation statement to explain how Rotary is unique among other clubs/organizations in SETX
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## Membership Recruitment Committee

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  - President, President-Elect, Membership Recruitment Chair

## *Membership Retention Committee*

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## *Board of Directors/Club Leaders*

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- Consider a more substantial marketing committee (or a charge that includes internal marketing)
  - Board of Directors
- Develop a program to prepare Club members for future Club leadership positions/opportunities
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## *Strategic Planning Committee*

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