

Rotary Club of La Crosse - Downtown

2021-2026 Strategic Plan

“Serve to Change Lives”



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Executive Summary

The Rotary Club of La Crosse is being challenged by Rotary International to *do* more and *grow* more. Our focus is to serve others: to create meaningful change in their lives. This 2021-2026 Strategic Plan document was developed to ensure continued service and fellowship among the members of the Rotary Club of La Crosse, now and into the future. This plan is the outcome of thoughtful and proactive organizational planning by the club's membership and leadership, which was accomplished through collaborative work in a formal planning process (The Planning Team). This strategic plan is also in alignment with the strategic goals of Rotary International. This plan represents the goals of the membership and thus, each member of the club needs to take ownership in the plan and personally work towards its success.

This plan lays out a blueprint with five strategic initiatives to achieve our mission and vision while at all times respecting our values. Written plans do not achieve our goals; success is achieved because people roll up their sleeves and do the work and follow the blueprint, keeping it in front of them to ensure they are staying on track. Our objective was to make SMART (Specific, Measurable, Attainable, Relevant, Time-bound) goals and objectives wherever possible. The Strategic Planning Committee is tasked with monitoring and reporting to the board the progress towards each of these goals and objectives.

The planning team has identified the various stakeholders who have an interest in the success of this plan. Concurrently we have developed a communication plan to share the elements of the strategic plan and their role in the same.

Plans like this are not static. It will evolve. The plan will be reviewed on a regular basis with updates being implemented as needed. The strategic planning committee will use the following Annual Planning Cycle:

Plan Development: 1) Initiate 2) Formulate & Develop 3) Translate & Plan

Plan Deployment: 4) Execute 5) Evaluate & Monitor 6) Refresh / Renew.

***Note:** you will find points of overlap within the plan among the five strategic initiatives.

Mission / Vision / Values

From Rotary International:

Mission Statement

We provide service to others, promote integrity, and advance world understanding, goodwill, and peace through our fellowship of business, professional, and community leaders.

Vision Statement

Together, we see a world where people unite and take action to create lasting change—across the globe, in our communities, and in ourselves.

Values

The world today is not the same as it was when Rotary was founded in 1905. Demographics have shifted, the pace of change has accelerated, and technology has created new opportunities for connection and service. What hasn't changed is a need for the values that define Rotary:

- Fellowship
- Integrity
- Diversity
- Service
- Leadership

By honoring our past and embracing our future, we can evolve and keep Rotary not only relevant, but thriving.

Rotary International's Strategic Priorities and Objectives

Increase Our Impact

- Eradicate polio and leverage the legacy
- Focus our programs and offerings
- Improve our ability to achieve and measure impact

Expand Our Reach

- Grow and diversify our membership and participation
- Create new channels into Rotary
- Increase Rotary's openness and appeal
- Build awareness of our impact and brand

Enhance Participant Engagement

- Support clubs to better engage their members
- Develop a participant-centered approach to deliver value
- Offer new opportunities for personal and professional connection
- Provide leadership development and skills training

Increase Our Ability to Adapt

- Build a culture of research, innovation, and willingness to take risks
- Streamline governance, structure, and processes
- Review governance to foster more diverse perspectives in decision-making

Environmental Assessment

***Note:** Driving Forces are a component of the environmental assessment. They are large-scale trends at the Global, National, and Regional level in the internal and external environment, in which Rotary functions/operates. These may be trends that are happening now, or that we anticipate will occur within the next five years. For example, COVID-19 is a driving force which impacts our organization and will change how Rotary will operate.

Driving Forces: Rotary International

Some things that make Rotary International unique is that RI has a seat at the United Nations, it has clubs in more nations than McDonald's, and typically \$343M is raised each year for Rotary International projects.

Internal Factors: <ul style="list-style-type: none">• Worldwide membership numbers are stagnant and even trending down• Complex organizational structure• Lack of continuity• Preparing for a post-polio world	External Factors: <ul style="list-style-type: none">• Technological• Demographic• Social• Competitive• Economic• Political
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In 2017 Rotary International sent over 1 million surveys with more than 75,000 respondents. They also conducted focus groups and interviews with more than 400 participants representing 29 countries. One of the questions they asked was, “Which of the following causes would be the focus of your ideal organization? The responses are included below:

	Rotarians	Rotaractors	Alumni	Non-Rotarians
1	Basic Education and Literacy	Basic Education and Literacy	Basic Education and Literacy	Basic Education and Literacy/Environment (tie)
2	Economic and Community Development	Economic and Community Development	Peace and Conflict Prevention and Resolution	Economic and Community Development
3	Water and Sanitation	Environment	Environment	Hunger and Food Scarcity
4	Hunger and Food Scarcity	Hunger and Food Scarcity	Human Rights	Human Rights
5	Disease Prevention and Treatment/ Environment (tie)	Peace and Conflict Prevention and Resolution	Economic and Community Development	Disease Prevention and Treatment

Driving Forces: Internal

<p>Internal Factors:</p> <ul style="list-style-type: none"> • Membership is steady • The majority of membership is male • Age skews older 	<p>External Factors:</p> <ul style="list-style-type: none"> • Technological • Demographic • Social • Competitive • Economic • Political
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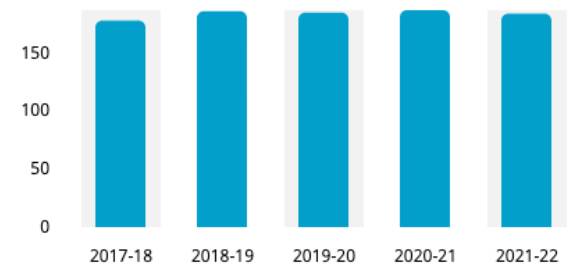
Driving Forces: 2016 - 2017 Rotary Club of La Crosse Strategic Plan

Category	2016-2017 Rotary Club of La Crosse Strategic Initiatives	2021 Update
Club Service	Non-profit of the month service focus	Needs more discussion
Club Service	Member self-report service projects and hours monthly (club & other)	Needs more discussion
Club Service	International: Cameroon project	Complete
Club Service	Monthly hands-on service built into our meeting format	Needs more discussion
Community	Select and initiate 100th anniversary promotion activities	Complete
Community	Increase community awareness of our Club and its community impact	Ongoing
Community	Vista Trail	Complete
New Generations	Start Rotaract at UW-L, Viterbo, Western	Decided not to pursue.
New Generations	High School clubs	West Salem, Logan, Central, Holmen, Aquinas, Caledonia, Onalaska
Membership	Get to know our members better.	Completed
Membership	Do pulse surveys to measure progress: baseline (7/16), mid-term (1/17), and end of term (6/17)	Completed two
Membership	Maintain an engaged membership in the 160-200 range	Ongoing
Membership	Encourage Diversity	Ongoing (DEI committee)
Membership	Plan for corporate memberships and sponsorships	Complete

Driving Forces: Membership, Giving, and Service Trends

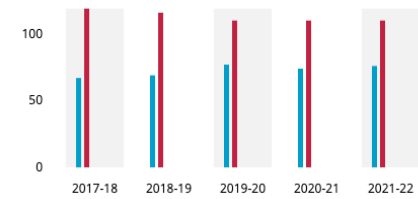
Membership over the past few years has been steady, is predominantly male, and skews older. The gender gap is slowly narrowing.

Membership Trends



	2017-18	2018-19	2019-20	2020-21	2021-22
● July 1	178	186	185	187	184

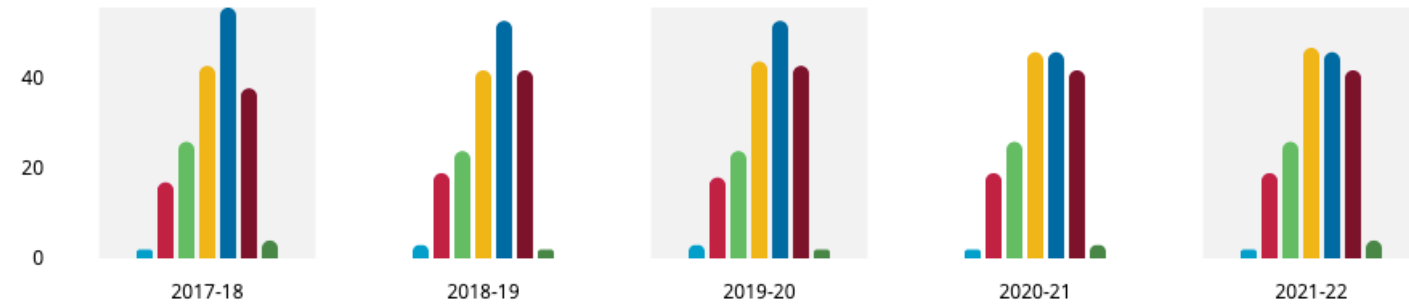
Gender Trends



	2017-18	2018-19	2019-20	2020-21	2021-22
● Female	67	69	77	74	76
● Male	119	116	110	110	110
● Self-describe	0	0	0	0	0
● Prefer not to identify	0	0	0	0	0
● Unreported	0	0	0	0	0

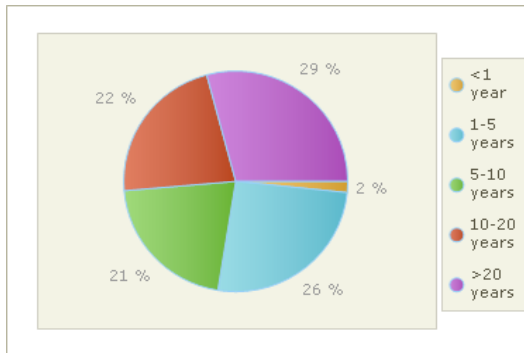
Members age 50 and older make up the majority of the club.

Age Trends



	2017-18	2018-19	2019-20	2020-21	2021-22
29 and Under	2	3	3	2	2
30-39	17	19	18	19	19
40-49	26	24	24	26	26
50-59	43	42	44	46	47
60-69	56	53	53	46	46
70 and Over	38	42	43	42	42
Unreported	4	2	2	3	4

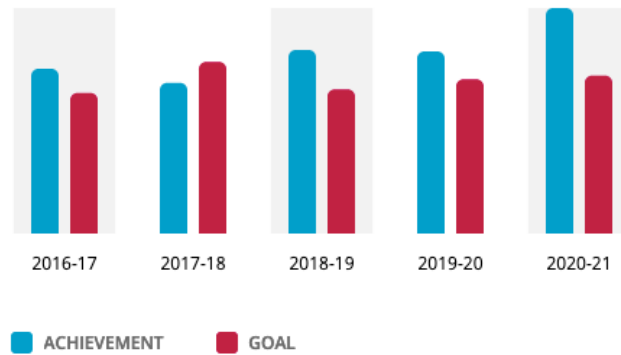
In 2021, our membership tenure:



Giving - Annual Fund Contributions:

Annual giving has generally increased each year and we've exceeded our giving goals.

Goal History

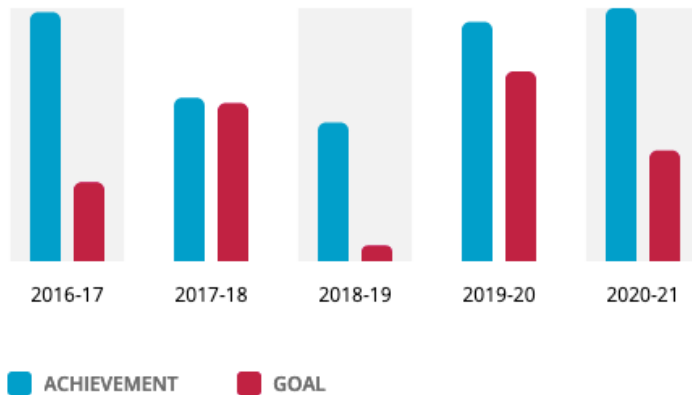


YEAR	ACHIEVEMENT		GOAL
2020-21	32,854	of	23,000
2019-20	26,551	of	22,500
2018-19	26,752	of	21,000
2017-18	21,942	of	25,000
2016-17	24,032	of	20,500
*denotes 5-year high			

Giving - Polio Plus Fund Contributions:

Polio Plus giving has annually exceeded our goals.

Goal History



YEAR	ACHIEVEMENT		GOAL
2020-21	16,002	of	7,000
2019-20	15,130	of	12,000
2018-19	8,776	of	1,000
2017-18	10,335	of	10,000
2016-17	15,743	of	5,000

*denotes 5-year high

Club Activities:

Fundraisers

- Club: Fruit basket sales, Packer ticket raffle, NCAA brackets, in-meeting fines (News, Braggers & Squealers, etc.), President's Choice Wine Fundraiser
- Community (pass-throughs): Al's Musky Challenge, Hearts to Schools - Revisited, Razia's Bus, Cameroon Garden, Habitat for Humanity, USO Veterans airport lounge, St. Clare mobile unit

Committees

- Community service: Environmental, Fruit Baskets, Humanitarian, Mobile Meals, Rotary Lights, Salvation Army Bell Ringing.
- New Generation: Interact, RYLA, Youth Committee, and Youth Exchange
- International Service: vocational team training, fellowship exchange, world community service projects

Service Opportunities

- Club: DEI (diversity, equity, and inclusion) committee, event planning, fellowship committee, membership committee, “new normal” (virtual technology) committee, nomination committee, orientation, program, and STAR committee
- Community (*some on hold due to COVID*): Come for Supper, Salvation Army Bell Ringing, Mobile Meals, iFeed, Rotary Lights, USO La Crosse Regional Airport Lounge, Brain Game, Kids’ Coulee cleanup

SWOT Analysis (Summary)

The Planning Team conducted a SWOT analysis of the Downtown Rotary Club as part of the process outlined above. The following is a summary of the output from that analysis. We have presented the top tier items for each category here. A complete listing of all items has been included in the attached Appendix 1:

Strengths

1. The Club Membership represents a wide range of skills and abilities. The Downtown Rotary Club is the second largest club in District 6250. This provides us with a larger base of individuals with unique skills to draw from. This number and wide range of skills allows the club to match those skills with specific needs as we are managing the club, organizing projects, working with other organizations in the community, etc. This provides us with a significant resource advantage.
2. The membership is committed to serving others. Club members are willing to volunteer their personal time and treasure for the improvement of our community, fellow rotary clubs, and the world community. Historically we have demonstrated a willingness to get involved in help whether it is Hurricane Relief fund on a special project or deliver mobile meals on a weekly basis. There has never been a lack or willingness to step up and help.
3. Downtown Rotary is willing to collaborate with many organizations at many levels. We have worked closely with fellow rotary clubs on joint projects such as Rotary Lights, other area non-profits on projects like Al’s Musky Challenge and with area youth programs such as IFeed and Interact, youth exchange, high school awards. The collaboration allows the club to expand their reach and impact. The inclusion of youth programs helps build future Rotarians.

Weaknesses

1. The club faces a need for increased diversity both socio economic and racial. To date we have not done a very good job of recruiting minority candidates. At this time there is a lack of initiatives focused on recruitment of minority groups. In addition, there is a concern that the cost of membership may bar some of these candidates from joining.
2. There are concerns over the cost of membership in general. It is felt the cost may be a barrier to membership for several members who are not able to afford the dues, meal cost, and expectation of members to donate financially to projects and fundraising campaigns. This is evidenced by the fact that approximately 60% of our membership have not contributed monetarily to at least one of our projects over the past year. A significant number of our members have dues and meal costs reimbursed by their employers. The concern is that if they change employers or no longer work, they may not be able to afford the membership.
3. It is felt that there is a lot of pressure for people to contribute to every project and campaign presented to the club. Peer pressure can be a significant influence on whether a person maintains or cancels their membership in the club.

Opportunities

1. We have identified an opportunity to consider alternative types of memberships. Examples of various types of memberships might be virtual membership, alternating meeting types, etc. Other considerations might be to establish a Satellite Club with lower dues, fewer meetings, more affordable, accessible, and less intense on the number of projects and fundraising campaigns.
2. In the past we have done a very good job at collaborating with other area clubs and organizations. We have the opportunity to expand relationships with other organizations (non-profits, other service clubs, community action groups, etc.) going forward and need to find ways to develop a liaison relationship with these other organizations. We have been and need to continue to be open to future opportunities and project collaboration.
3. As mentioned above as a weakness, increasing the diversity of our club is also a significant opportunity. We have the opportunity to have our club mirror the demographics of our community. We need to consider moving towards increased inclusivity as we are seeking collaborative opportunities. We can increase the quality and expand the diversity of our guest speakers for the programs presented to the club.

Threats

1. There is concern that the club is taking on too many fund-raising projects at a time. If the volume and scope of these fund-raising efforts are not properly managed the risk is that we will exhaust our membership leading to dis-engagement and lack of participation in the events. It is recommended that these efforts be prioritized and limited in number. It is also recommended that they be spread out throughout the rotary year.
2. As the club grows and becomes more involved in the community, many things compete for everyone's time. We want to attract engaged activists in the community; however, they are often busy. There becomes a need for work / volunteer life balance. We need to encourage mental health and well-being through maintaining this balance. We often reward people who overdo it. The club needs to remain vigilant in looking for members who are overdoing it and we should be aware of burnout.
3. Maintaining the club's public image is critical. Because of the past success and the amount for fundraising that we do there is a perception in the community that the club is just about raising money. This may be a turn-off. There has been some feedback that other rotary clubs get annoyed that we ask their members for funds. It is important that we build and maintain an image of service before self, that we are a club of action in service and not just a fundraiser.

Rotary Strategic Initiatives

Members & Engagement

5 Year Future State Vision Statement: Our club's membership is demographically representative of our community, and we have exceeded our engagement goals. Once members join, they want to stay. We recognize that every member's way of engaging with Rotary is unique, and that our club values every member's commitment to Rotary, whether through time, talent, or treasure.

3 Year Goals / 1 Year Objectives

1. Recruitment: Develop a welcoming, inclusive practice of member recruitment, retention, and engagement such that the club increases its diversity through the following goals for the next three years: 1) recruit at least three members under 40 and five members under 50 annually, 2) achieve and maintain at least 50% male to female gender ratio and welcome non-binary members to join, 3) recruit at least three new members of color annually, 4) encourage members of all sexual orientations.
 - a. Review RI equity resources for tools for improving inclusivity.
 - b. Review policies and practices for member recruitment and retention with an eye for equity. Make appropriate changes and additions. Explore history of Rotary as it relates to diverse communities (race, gender, age, etc.) and share with the club.
 - c. Work with the DEI (Diversity, Equity, and Inclusion) committee to educate members about inclusive recruitment/retention practices and to develop new practices.
 - d. Encourage members to bring guests to meetings, events, and service opportunities, especially younger and more diverse individuals.
 - e. Working through DEI committee, begin discussions with Black Leaders Acquiring Collective Knowledge, Greater La Crosse Diversity Council, Cia Siab, Hope Restores, Ho-Chunk Nation, The Center: 7 Rivers LGBTQ Connection and other cultural organizations about speaker opportunities (at Rotary or at these organizations), volunteer opportunities (Rotarians volunteering for these organizations), educational opportunities, and partnerships/joint fundraising, etc.
 - f. Prioritize communication and collaboration with community stakeholders such as Black Leaders Acquiring Collective Knowledge, Greater La Crosse Diversity Council, Cia Siab, Hope Restores, Ho-Chunk Nation, The Center: 7 Rivers LGBTQ Connection and other cultural organizations.
 - g. Promote work of the DEI committee (and encourage members to join the committee) at least Quarterly through newsletter and meetings.
 - h. Develop outreach materials (social media, print, etc.) that promote inclusivity improvements of the club.
 - i. Survey members about the club environment to ensure it is welcoming and inclusive.

- j. Promote environmental service projects to help pique the interest of younger prospective members
2. Engagement: Annually the board will establish the number of hours the membership will collectively provide for service projects.
- a. Share membership engagement goals with members annually and share volunteer opportunities in every newsletter.
 - b. Create service opportunities that encourage investment of time as well as financial giving, and promote involvement of guests, family members, and young people (esp. Interact and Rotaract members and friends).
 - c. Spotlight at least one local, regional, or global project that has volunteer opportunities in each newsletter and member meeting.
 - d. Create a mechanism to track meeting, service, event, and other volunteer hours as well as financial commitments to events, and report to membership quarterly. Provide comparison to annual and strategic plan (three-year) goals and show trends.
 - e. The Service Committee will track the ratio of service hours to financial support and note trends in each.
3. Retention: Retain at least 100% net membership (with new members offsetting departures and honorary reclassifications) annually. (That's a net loss of five members at our current rate.)
- a. Explore online only memberships and promote in every newsletter. Provide virtual membership information to all departing members and those changing to honorary status.
 - b. Consider a new membership level for members who are not becoming honorary.
 - c. Develop a mentorship program for new members so they have 1-2 members in addition to their sponsor to guide them through the Rotary process, help them feel welcome and involved, attend events together, and answer questions.
 - d. Work with Fellowship Committee and fellowship groups to create fellowship opportunities or events that welcome family members and youth to Rotary (as well as Interact and Rotaract).
 - e. If a member is going to leave, encourage them to consider other area clubs. Talk about this at the monthly Presidents' meeting.

Rotary Foundation Giving

5 Year Future State Vision Statement: Members of the Rotary Club of La Crosse - Downtown understand who the Rotary Foundation serves (locally and globally) and how funds donated to the Rotary Foundation multiply through matching grants at the District and International level. Members are re-enrolled in both the Annual Fund and Polio Plus fund biannually. The number of donors and the amount donated increase each year.

3 Year Goals / 1 Year Objectives

1. The number of Rotary Club of La Crosse - Downtown members who donate to the Annual Fund, the Polio Plus fund, and the Rotary Works Foundation increases each year.
 - a. One program per year is dedicated to the Foundation: who it serves, how it works, how much our club contributes, why it's important, and how to enroll in planned giving and/or make a donation. This would include a demonstration of how to sign up for and access the MyRotary digital dashboards for giving / stewardship. Include enrollment forms at the meeting.
 - b. One per quarter social media posts re: Foundation giving
 - c. Newsletter article about importance of Foundation giving - sent two weeks ahead of November meeting with Foundation presentation; consider including "why I give" testimonials from our club members
 - d. One week before the November meeting with Foundation presentation send a direct email with info / request
 - e. Research and identify additional donor contacts/touchpoints leading up to Foundation month
 - f. Increase the number of Paul Harris Fellowships by 5 percent each year.
2. The amount the Rotary Club of La Crosse - Downtown members contribute to the Annual Fund, the Polio Plus fund, and the Rotary Works Foundation increases each year.
 - a. One program per year is dedicated to the Foundation: who it serves, how it works, how much our club contributes, why it's important, and how to enroll in planned giving and/or make a donation. This would include a demonstration of how to sign up for and access the MyRotary digital dashboards for giving / stewardship. Include enrollment forms at the meeting.
 - b. One per quarter social media posts re: Foundation giving
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 - d. One week before the November meeting with Foundation presentation send a direct email with info / request
 - e. Research and identify additional donor contacts/touchpoints leading up to Foundation month
 - f. Enhance members' awareness of options for Legacy Giving

3. The number of Rotary Club of La Crosse - Downtown members with a MyRotary account increases.
 - a. One program per year is dedicated to the Foundation: who it serves, how it works, how much our club contributes, why it's important, and how to enroll in planned giving and/or make a donation. This would include a demonstration of how to sign up for and access the MyRotary digital dashboards for giving / stewardship. Include enrollment forms at the meeting.
 - b. One per quarter social media posts re: Foundation giving
 - c. Newsletter article about importance of Foundation giving - sent two weeks ahead of November meeting with Foundation presentation; consider including "why I give" testimonials from our club members
 - d. One week before the November meeting with Foundation presentation send a direct email with info / request
 - e. Research and identify additional donor contacts/touchpoints leading up to Foundation month

Service

5 Year Future State Vision Statement: Our vision is for the community to equate Rotary with service and for our members to equate service activities with a growing membership, fellowship, and fun.

3 Year Goals/ 1 Year Objectives

1. Continue collaboration between Rotary Club of La Crosse - Downtown and other organizations. Identify local projects where we can collaborate with other groups within our community. When choosing service projects, look for opportunities to collaborate with other groups (rotary and non-rotary).
 - a. Ensure that at least one of our projects each year is collaborative with another entity.
 - b. The club will develop a group of liaisons for other service clubs, non-profits, and agencies. This group will create networking opportunities with these other organizations.
 - c. Engage various area Interact Clubs in service projects. Conduct at least 2 projects that engage an area Interact Club annually (in addition to iFeed).
 - d. Encourage members to share projects they are passionate about, complete a project proposal form and submit it to the board. Provide more education around the project approval process - who can propose a project? How?
2. It is the intent of the organization to hold service opportunities at an increased frequency when compared to current levels. These opportunities need to be recognized as having equal value in meeting the club's mission of fundraising and fellowship. In fact, it is our hope to incorporate fellowship opportunities into various service projects. It is through this increased Fellowship that we hope to utilize our service projects as a tool to increase future membership.
 - a. Build out the individual committee web pages so each committee has a landing page with an overview of what that committee does, past/current projects, and who to contact to get involved.
 - b. Each committee will collaborate with the Public Image Committee to publish a "meet the committee" spotlight of each committee on social media throughout the year with a link to how to get involved.
 - c. When appropriate we will structure service projects to be Family Oriented. Have the members engaged in the project as a family participation event. We will hold at least 2 of these Family Focused events annually.
 - i. Examples of where we are already doing this would be Kids Coulee, Come for Supper, Rotary Lights, Fruit Boxes, etc.
 - ii. Note there may be age restrictions due to tasks being performed.
 - d. We will try and have some form of fellowship component as part of over 50% of all the service projects that we work on in any given year.

- e. The club will strive to have at least 2 non-members participate in 75% of all service projects the club engages in during each calendar year. The committees sponsoring the project will be responsible for tracking this metric and reporting out to the club administrator.
- 3. The club will become more engaged in taking on local service projects addressing (or 1 of the 7 areas) environmental issues for at least one year. These could be small service projects that only take a few hours, such as working in the RIFG garden, trail cleanup, reading to children, working with HFH, highway cleanup, etc. Over the next 3 years as our focus on Eradication of Polio declines, we will shift those resources to addressing environmental issues. Clean water will become a more significant issue of the future and the club will develop service projects around this issue.
 - a. During the coming two years the club will develop a project in collaboration with other regional Rotary clubs which will have an environmental focus. Part of the project will be to apply for and receive funding via the Global Grant funding with the focus aligned with the proposed project. The project will be considered successful if achieving collaboration with other clubs, attaining the funding needed, and providing an opportunity for members to be engaged in the project in a fun-filled way.

We will look to engage local Interact clubs in support of the project outlined above.

Achieve balance between service projects and fundraising projects - “sweat equity” vs writing a check - we equally value time, talent, treasure.

Young Leaders

5 Year Future State Vision Statement: In five years' time, our Rotary Club will be well-informed about our Young Leader programs and how they can get involved. There will be seven collaborative Interact groups in area high schools. Rotarians from surrounding clubs will participate with Interact clubs and Rotary members will be active in the life experiences of the youth exchange students.

3 Year Goals / 1 Year Objectives

1. Present information and engagement opportunities about local Interact clubs and youth exchange programs once a year at all area clubs.
 - a. Scout service-oriented students at high schools/universities and try to recruit them into Interact/Rotary. Conduct outreach to student organizations, such as international students, Black Student Unity, etc.
 - b. Conduct outreach to faculty/staff at academic institutions who would be interested in Rotary - both to join themselves, and to champion Interact with students.
 - c. Youth Exchange committee to create a system for connection between local interact clubs and local rotary club service projects by September of each year.
2. Create a connection with local Interact clubs to engage with our surrounding clubs and various service projects. Continue our support of RYLA (beyond just financial).
 - a. Provide more opportunities for Rotarians and their families to engage with our future Rotarians through our various youth-affiliated opportunities: Interact and Youth Exchange programs.
3. Create a system of support for youth exchange host families to encourage others to become host families and to encourage engagement between students and club members.
 - a. Expand outreach to nontraditional host families, such as empty nesters, etc. Get creative in recruiting host families.

Public Image

5 Year Future State Vision Statement: The Rotary Club of La Crosse is known as a welcoming and inclusive organization. We are seen as a leading service organization in the community. We're recognized as a group that "gets things done" in service to our community and the world. Our rich history of collaboration & service is recognized and respected across the community. We are relevant.

3 Year Goals / 1 Year Objectives:

1. Refine our brand to differentiate ourselves from other Service clubs and other Rotary clubs. A key component of our brand reputation is "the club that gets things done in the community." (Brand Management)
 - a. Reactivate a public image committee within the club, using guidance from the District Public Image committee. (2021) They will be tasked with developing and implementing an Integrated Marketing Plan in 2021-2022 to execute our Brand Management strategy and other related marketing, public relations, digital, communications and media relations strategies. This should include Internal Marketing to our Club Members. "Our best marketers are our Club members" We need to make sure our Club members have key information to share with others in the community. This could include facilitating interactive activities within the club to help members to get to know each other, to help support our inclusion/welcoming-ness.
 - b. Conduct annual focus groups and online survey with community-at-large members, and Rotarians, to measure overall awareness, knowledge regarding our inclusiveness, welcoming culture, and our reputation for service to establish annual benchmarks.
 - c. Engage in Cause/Advocacy Marketing. Our message is that our Club is a supporter of specific causes that impact our community and the world.
 - i. Continue messaging regarding the Rotary efforts to eradicate polio.
 - ii. Establish that the Rotary Club of La Crosse is a champion for environmental sustainability in our region and beyond.
 - iii. We should partner with organizations that represent diverse populations to do projects.
 - iv. Continue to expand our efforts in Child Development (Brain Game) in the Upper Midwest, the Nation and the World
 - v. Identify and select Cause/Advocacy opportunities in the La Crosse Region on an annual basis. Develop Criteria for selection.
2. Increased / more frequent media coverage (projects, speakers), promoting the message of Rotary Club of La Crosse - Downtown as "an organization that gets things done."

- a. Develop and implement a traditional media and Digital media outreach strategy in 2021-2022. Establish “Earned Media” annual targets for Tradition Media and Digital Media analytics tracking to establish annual targets for the La Crosse Region.
 - b. Annual or quarterly report for the club at the end of the year to recap our great work, possibly earned media coverage, and use for recruitment of new members.
 - c. Schedule discussion with the editorial board at Tribune to share what we do / invite someone from there to become a member. Invite other media executives to join. Could we have a regular column in the Tribune?
 - d. Create welcome packets using RI materials and create local brochures that could be used at events like Moon Tunes, Rotary Lights. etc. for recruitment of new members.
3. Expand partnerships with other groups / institutions / Rotary/Interact Clubs to increase awareness and reach. Keep club collaboration top of mind when planning events, fundraisers, education events, etc. This will include a special focus on partnering with organizations that represent diverse populations to do projects. We will also be strategic about the speakers we solicit.
- a. Keep club collaboration top of mind when planning events, fundraisers, education events, etc.
 - b. Inventory and identify regional events and fundraisers that benefit all the clubs and their communities.
 - c. Develop and implement a proactive plan to engage and invite a diverse group of speakers for club programs and for our leadership programs. (Programs that are bold, break the stereotype and facilitate new thinking in the Club and the community)
 - d. Partner with organizations that represent diverse populations to address Rotary and Community projects that demonstrate our (showcase) our leadership and commitment to diversity.
 - e. Develop Guiding Principles for developing expanded partnership with other organizations to ensure alignment with the Club (what things are we looking for in a partnership e.g., opportunities for increased awareness and image, membership recruitment, diversity, mutually beneficial collaborations, service to change lives, remaining relevant,)
 - f. Add Historian role to collect and organize mementos

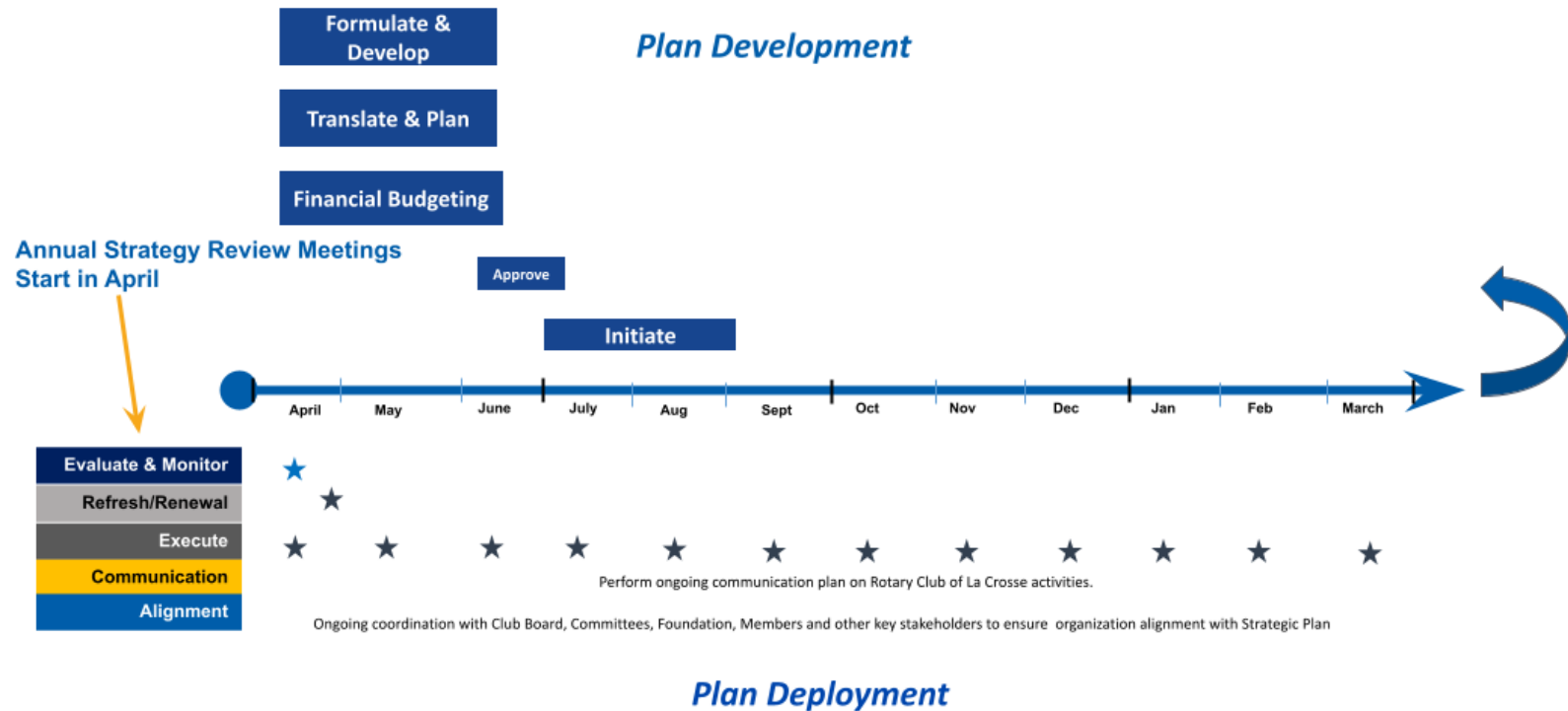
Strategy Deployment (Execution)

To implement our Downtown Rotary Club Strategic Plan we will stay focused, hold ourselves accountable, keep the plan in front of us, make course corrections as required and establish a Rhythm and Cadence model through our Planning Calendar and communicate to our Key Stakeholders with respect to our performance-to-plan.

Key Implementation Tasks:

1. Goals and Objectives will be assigned to either Board Members or Club Committees as appropriate for development and implementation.
2. Spread work assignments across people and time to avoid overloading the front-end of the plan and provide balance or work with capacity and resources.
3. Assign responsibilities to individuals or teams and hold them accountable for performance.
4. Establish timelines for task completion.
5. Create performance targets and measures to evaluate performance to plan and always know the status of the work.

Annual Planning Calendar “Rhythm & Cadence”: *A Model*



Evaluation & Monitoring Process

Key to the successful execution of the Plan will be putting in place a process of ongoing Evaluation and Monitoring of our “Performance-to-Plan.” The Evaluation and Monitoring process is designed to keep the plan actively in front of us through a schedule of key review points where Strategic Initiatives and 3-Year Goals/1-Year Objectives are actively monitored. Performance Targets and Metrics will be developed for each Strategic Initiative and their review will be built into the Board of Directors monthly meetings, along with operational discussions. In addition, a formal Strategy Review Meeting (SRM's) schedule will be put in place on an annual cycle.

The Strategy Review Meetings (SRMs) process is designed to increase our strategic focus, enhancing both plan execution and performance. SRMs will follow a scripted process of performance review. This conversation will center on past 90 Day performances (red or green). We want to recognize positive plan performance and provide a venue for addressing areas of plan variance from target. Conversations will focus on performance-to-target, variance, corrective actions and required resources needed from leadership to achieve desired results. Lastly, the process will look forward to proposing “Action Steps” to accomplish before the next review. The SRMs will be the responsibility of the Executive Committee of the Board and lead by the President-Elect assisted by the Plan Operations Committee

Committee chairs will submit a few sentence summary report to the president elect in time for inclusion in the board packet, one week before the monthly board meeting which is the second monday of each month. The President elect will facilitate an annual deeper dive review in April / May when they are setting goals for the District/RI.

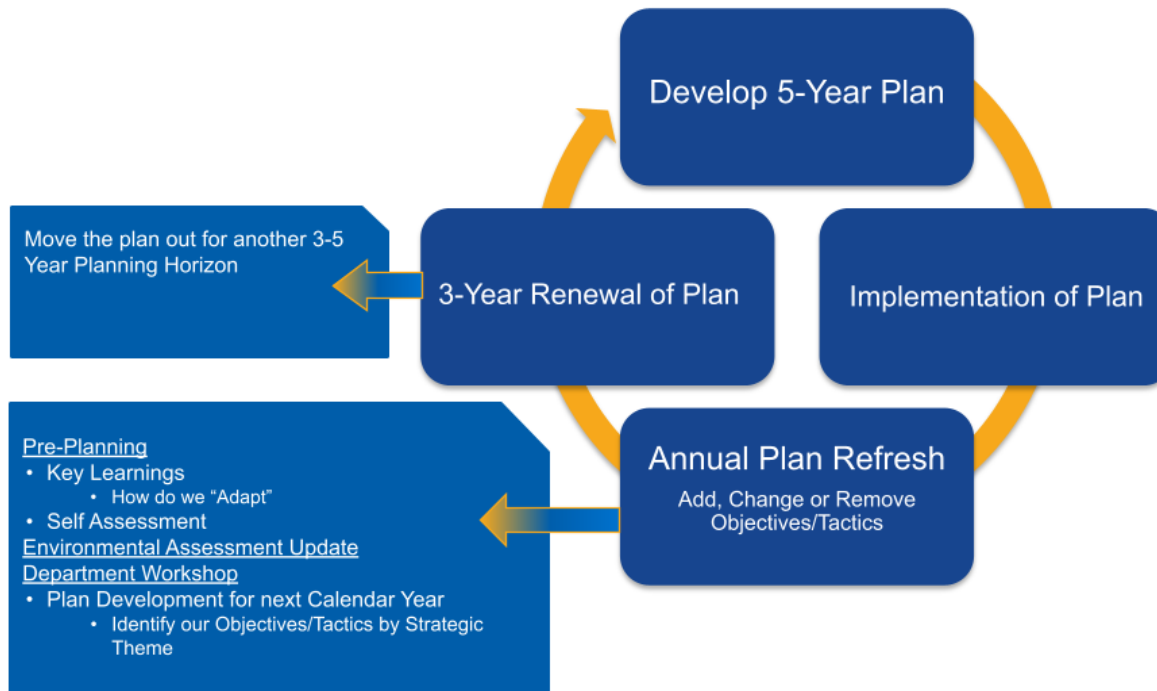


Plan Refresh & Renewal Cycle

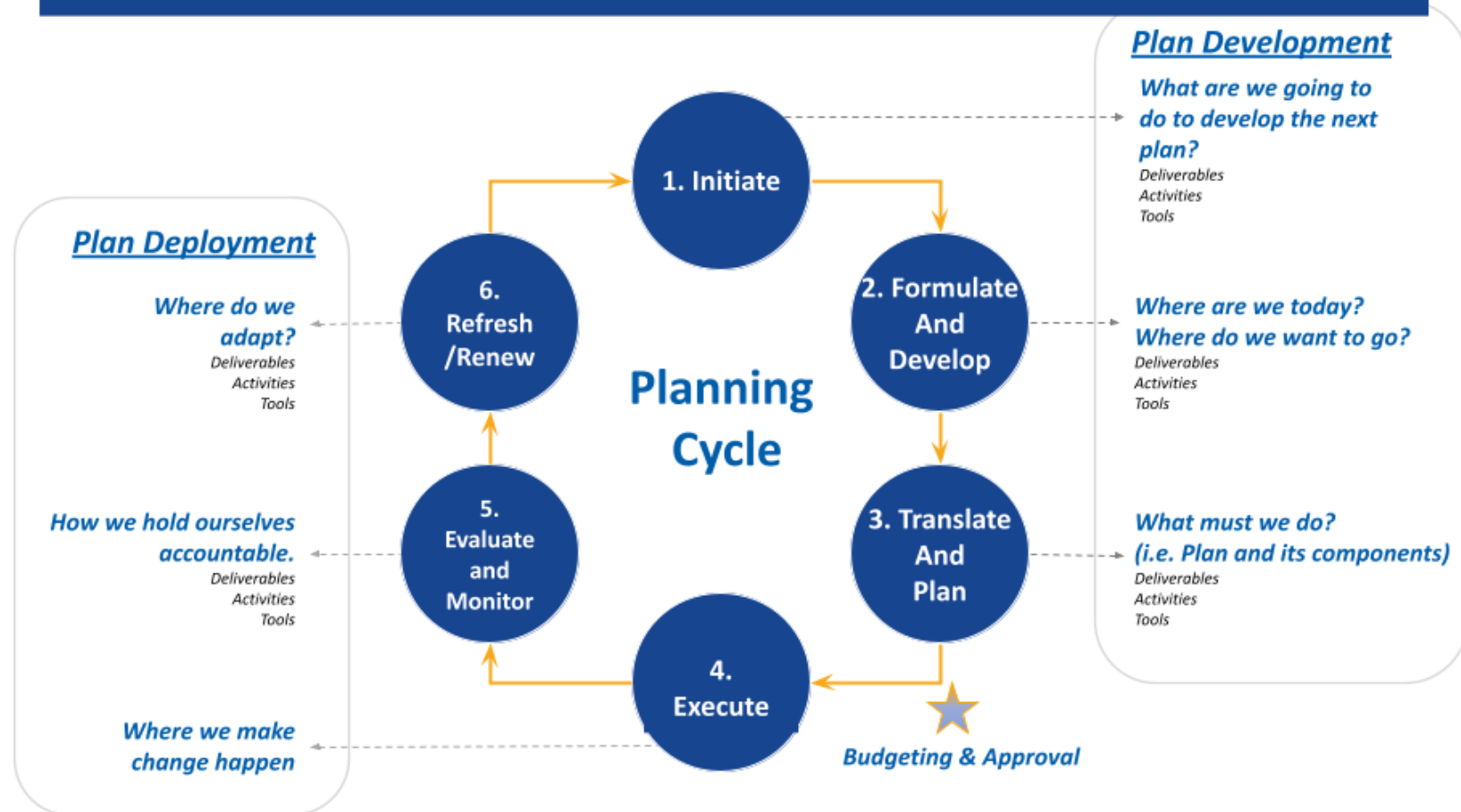
The 5-Year Planning Horizon for our plan has several key milestone activities, the Annual Refresh and the overall Plan Renewal. The first milestone, Plan Refresh, is designed to audit our annual performance for the preceding year, the work completed and not completed. *This assessment will be used to determine work not completed that should be carried over to the next calendar year, along with finalizing work originally included in the plan for the next year.* Finally, due to changes in the overall environment, are there any new Goals to be considered and placed in the plan.

The second milestone is focused on “Plan Renewal”. We don’t want to ever have a period for which we don’t have a live plan in place. During Year-3 of the Plan, the Executive Committee and Plan Operations Committee will put together the process to be used to update and push the plan out another 3-5 years.

Plan Refresh and Renewal



Annual Planning Cycle



Communication Plan

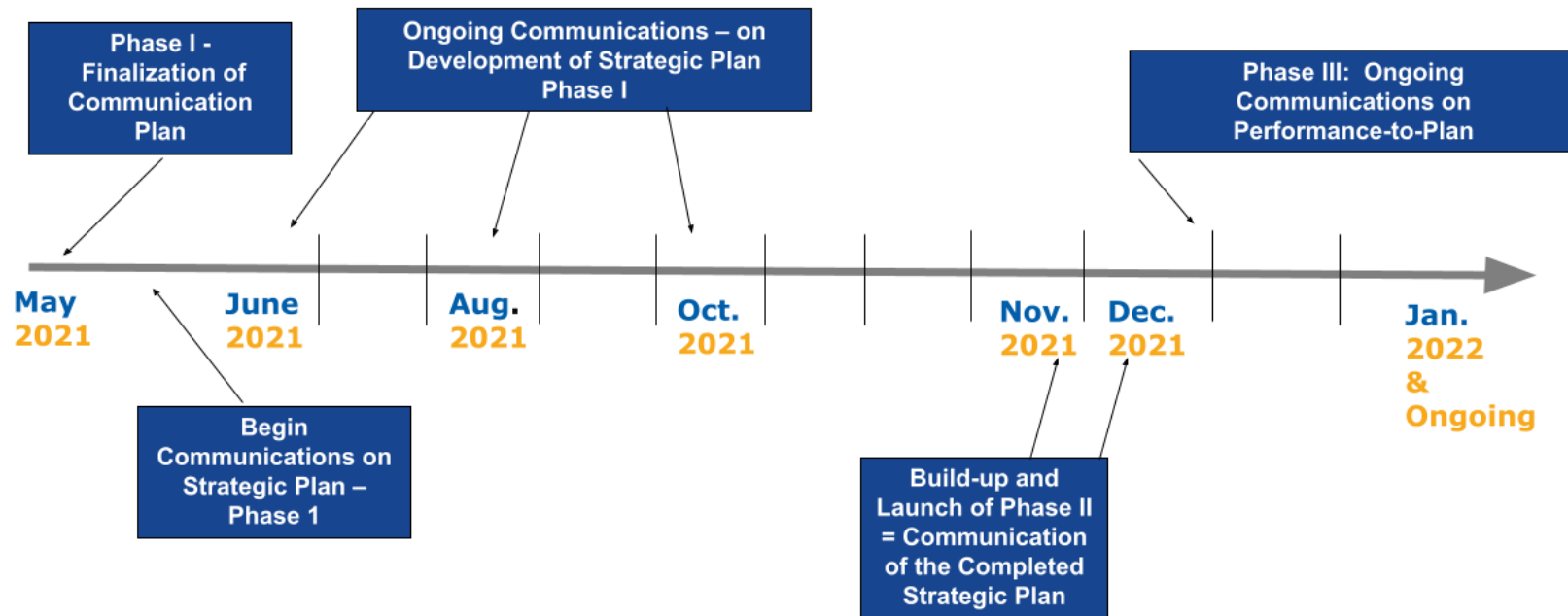
Upon approval of the Strategic Plan, our Communication Plan will be developed and implemented. The plan will convey our overall Strategic Intent to our Key Stakeholder audiences, internally and externally, followed by regular communications to the Board of Directors and Club Members throughout the year for the duration of the current plan. It will be the responsibility of the Executive Committee of the Board (and the Planning Operations Committee) to oversee this process. An example template is provided here:

Rotary Communication Plan Template						
Specific Messages	Who Needs to Know	What They Need to Know	Who Will Tell them	How Will We Tell Them	When do we Tell Them (Deadline)	Landmines/Barriers
Prioritized Key Stakeholders }	Club Board	1-2 sentence from each of 5 areas	president elect	Verbal update	Monthly at board meeting	
	Club Members	-overview -periodic updates	president elect + committee chairs	Coulee report weekly bulletin and 1 annual update in Jan. + handout	Jan meeting	
	La Crosse Area Rotary Clubs			Monthly presidents meeting		
	Community-at-Large	projects	public image committee	Media release social media	as needed	
	Media	projects	public image committee	Media release		

11/29/2021

4

Communication of Plan Implementation/Timeline Model



Appendix 1 - SWOT Analysis (Complete)

Strengths

1. Tier I Strengths

- a. The Club Membership represents a wide range of skills and abilities. The Downtown Rotary Club is one of the larger clubs in District 6250. This provides us with a larger base of individuals with unique skills to draw from. This number and wide range of skills allows the club to match those skills with specific needs as we are managing the club, organizing projects, working with other organizations in the community, etc.
- b. The membership is engaged and committed to serving others. Club members are willing to volunteer their personal time and treasure for the improvement of our community, fellow rotary clubs, and the world community. Historically we have demonstrated a willingness to get involved in help whether it is Hurricane Relief fund on a special project or deliver mobile meals on a weekly basis. There has never been a lack or willingness to step up and help.
- c. Downtown Rotary is willing to Collaborate with many organizations at many levels. We have worked closely with fellow rotary clubs on joint projects such as Rotary Lights, other area non-profits on projects like Al's Musky Challenge and with area youth programs such as IFeed and Interact, youth exchange, high school awards. The collaboration allows the club to expand their reach and impact. The inclusion of youth programs helps build future Rotarians.

2. Tier II

- a. To date the club has maintained a good educational orientation program for new members. This has led to better onboarding processes resulting in higher retention rate.
- b. The club maintains a dedicated administrator that addresses many of the functions that typically must be dealt with by volunteers in other clubs. This allows our membership to be much more effective at managing projects. To date we have been fortunate to have amazing club administrators.
- c. The club has remained strong at being willing to initiate projects and act. The club has been willing to escalate projects to a regional or district level to ensure success. As we have been starting these projects the club has demonstrated the ability to be innovative in developing an action plan or seeking solutions to problems or limitations presented.
- d. Currently the club enjoys a positive reputation within our community which helps us attract new members and access to collaborators for support of our efforts.
- e. In the past the club has been able to take advantage of grant opportunities available within the district and beyond.

3. Tier III

- a. We currently have several community leaders who are members of our club.

- b. The club provides educational opportunities through weekly meetings and speakers which allows us to learn about what is happening locally and globally.
- c. At this point our members are very generous and have supported a lot of fundraisers.

Weaknesses

1. Tier I

- a. The club faces a need for increased diversity both socio economic and racial. To date we have not done a very good job of recruiting minority candidates. At this time there is a lack of initiatives focused on recruitment of minority groups. In addition, there is a concern that the cost of membership may exclude some of these candidates from joining. Diversity - increase overall diversity. Lack of initiative to go out and get more diverse members. Need to recruit diverse members.
- b. There are concerns over the cost of membership in general. It is felt the cost may be a barrier to membership for potential members who are not able to afford the dues, meal cost, and expectation for members to donate financially to projects and fundraising campaigns. This is evidenced by the fact that approximately 60% of our membership have not contributed monetarily to one of our projects over the past year. A significant number of our members have dues and meal costs reimbursed by their employers. The concern is that if they change employers or no longer work, they may not be able to afford the membership.
- c. It is felt that there is a lot of pressure for people to contribute to every project and campaign presented to the club. Peer pressure can be a significant influence on whether a person maintains or cancels their membership in the club. Cost of membership?

2. Tier II

- a. There is a concern that we may be losing engagement in service and commitment of members. Some feel we don't do enough to integrate our members (new and old) to onboard/engage them in projects and events. It was questioned if the meeting format impacted member engagement. Do people get too comfortable with meeting/connecting with the same people before the meeting? What will the impact of Zoom have on meetings going forward?
- b. The demographics of the club, principally the age can be limiting to our effectiveness
- c. There is a concern we may be experiencing Death by Zoom? Building back up relationships that were lost over COVID.

3. Tier III

- a. The club size has made it difficult to get to know all members. The size of the meetings and the total number of members can be intimidating to new members.
- b. There is concern that we have too many projects going on at the same time. It was suggested that we focus on one project at a time.

- c. There was a concern that too many tasks are being handed off to the club administrator causing burn out.
- d. We have a Rotary way of doing things which can feel overregulated and intimidating.

Opportunities

1. Tier I

- a. We have identified an opportunity to consider alternative types of memberships. Examples of various types of memberships might be virtual membership, alternating meeting types, etc... Other considerations might be to establish a Satellite Club with lower dues, fewer meetings, more affordable, accessible, and less intense on the number of projects and fundraising campaigns.
- b. In the past we have done a very good job at collaborating with other area clubs and organizations. We have the opportunity to expand relationships with other organizations (non-profits, other service clubs, community action groups, etc.) going forward and need to find ways to develop a liaison relationship with these other organizations. We have been and need to continue to be open to future opportunities and project collaboration.
- c. As mentioned above as a weakness, increasing the diversity of our club is also a significant opportunity. We have the opportunity to have our club mirror the demographics of our community. We need to consider moving towards increased inclusivity as we seek collaborative opportunities. We can increase the quality and expand the diversity of our guest speakers the programs presented to the club.

2. Tier II

- a. It was suggested that we might be able to find intimacy and engagement within the club. (e.g., Crystal Cathedral - people were asked what everyone liked about the church (membership of 5000 or so) and the response was "intimacy". The members gather in groups of 15 and it encourages members to become incorporated in the group which leads to higher engagement. Should we consider some type of buddy system for new or less engaged members?
- b. Should we trend towards digital format for meetings and club events (e.g., Venmo, satellite club). Do we offer different types of meetings (every other meeting is virtual or service-related)? Do we offer multi delivery meetings? What will the impact on member engagement and fellowship be as a result?

3. Tier III

- a. We can get more club members involved at a higher level, for example district conference or training opportunities.
- b. Opportunity to fund worthwhile projects locally and globally. (e.g., Musky tournament helps local agencies that need funding.)
- c. We need to take the opportunity to get more information back to our club on Rotary Works.

- d. There is an opportunity to give more information to our club on what other clubs are doing, club reports from area presidents.
- e. We need to find ways to retain members who are retiring. These members are significant resources to our community and club. For some it may be financially challenging to continue in our club under the current membership structure.

Threats

1. Tier I

- a. There is concern that the club is taking on too many fund-raising projects at a time. If the volume and scope of these fund-raising efforts are not properly managed the risk is that we will exhaust our membership leading to dis-engagement and lack of participation in the events. It is recommended that these efforts be prioritized and limited in number. It is also recommended that they be spread out throughout the rotary year.
- b. As the club grows and becomes more involved in the community, many things compete for everyone's time. We want to attract engaged activists in the community; however, they are often busy. There becomes a need for work / volunteer life balance. We need to encourage mental health and well-being through maintaining this balance. We often reward people who overdo it. The club need to remain vigilant in looking for members who are overriding it and we should be aware of burnout.
- c. Maintaining the club's public image is critical. Because of the past success and the amount for fundraising that we do there is a perception in the community that the club is just about raising money. This may be a turn-off. There has been some feedback that other rotary clubs get annoyed that we ask their members for funds. It is important that we build and maintain an image of service before self, that we are a club of action in service and not just a fund raiser.

2. Tier II

- a. How people obtain information has changed. The media and news in general have and continues to evolve. There is concern that the club may not be evolving with this change. What is our objective with Rotarians in the News? Are we adapting?

3. Tier III

- a. Data indicates Rotary membership nationwide is on the decline. Clubs, by nature, are exclusive which may be a turn off to some people. (Could be generational.) What do we do to combat this trend and image for the benefit of our club?
- b. Hearing judgement within survey and last strategic meeting.
- c. There is concern there are too many fines through Rotarians in the News. Often the same people are repeatedly called upon by the nature of their jobs or position within the community. Is the purpose to call the things our membership is doing within our community or is it to raise money?

d. COVID

Appendix 2 - Key Stakeholders

1. Tier I

- a. Members
- b. Local organizations that benefit
- c. Community at large

2. Tier II

- a. Governing Bodies of the Club
 - i. Board of Directors
 - ii. Rotary International
 - iii. Rotary International Foundation
 - iv. Rotary Works Foundation
 - v. District 6250
- b. Beneficiaries of our fundraisers

3. Tier III

- a. Other Rotary Clubs
- b. Club administrator
- c. Media

- Live by the Four-Way Test (of the things we think, say, or do)
- We will be good stewards of money donated
- That we support the community. Rotary will enrich and make our community a better place to live, work and have fun.
- Leadership is transparent and engaged
- That we are forward thinking for the community
- Ultimate purpose is to serve.
- Sustainability within the club including an evolution to meet new needs - e.g., Rotary Lights, Kids Coulee. Keep doing what we are doing and maintain projects in existence.

Appendix 3 - Strategic Plan Participants

Name	Title	Name	Title
Sarah Arendt Beyer	Board of Directors	Candice Tlustosch	Incoming Board of Directors
Andrew Bakkum	Board of Directors	Lee Rasch	Incoming Board of Directors
Al Louis	Board of Directors	Jamie Schloegel	Incoming Board of Directors
Alex Lueck	Board of Directors	Lauren Journot	Incoming Board of Directors
Catherine Kolkmeier	Board of Directors	Peter Hughes	Rotary member and Facilitator
Diana Carey	Board of Directors	Nicole Van Ert	Facilitator
Eva Marie Restel	Board of Directors	Daniels Burke, Courtney L	Member at Large - New Member
Kenna Christians	Board of Directors	Sam Przywojski	Member at Large - New Member
Mark Jolivette	Board of Directors	Patricia Boge	Member at Large - Past President and Strategic Planner
Michelle Skemp	Board of Directors	Dean Dickinson	Member at Large - Annual Support Chair
Mary Beth Hensel	Board of Directors	Bill Hoel	Member at Large - Past District Governor
Nicholas Passe	Board of Directors	Tom Berkedal	Member at Large - Youth Committee Chair
Pat Ruda	Board of Directors	Curti, Greg	Member at Large - Membership Chair
Rob.Palmberg	Board of Directors	Bob Allen	Assistant Governor for our Rotary District
Steve O'Malley	Board of Directors	Jamie O'Neill	Club Administrator and Writer
Tami Woods	Board of Directors		
Tim Durtsche	Board of Directors	Writing team: Sarah Arendt-Beyer, Eva Marie Restel, Peter Hughes, Mike Nickel, Catherine Kolkmeier, Jamie O'Neill	
Mike Nickel	Incoming Board of Directors		
Patty Nuttleman	Incoming Board of Directors		

Appendix 4 - Other Considerations for Managing the Plan

- Place planning sequentially ahead of budgeting, where possible
 - Budgets enable the plan
 - Identify price tags for Strategic Plan goals, as appropriate
- The assignment of goals should be a back and forth discussion and negotiation between the Club Board and Committees of the Board. The “What” is the Club Board of Directors responsibility to communicate and the “How” is the responsibility of the Committees to develop. A negotiated discussion finalizes the work.
- Just because it is in “The Plan” doesn’t mean it is approved
 - Strategic Goals may require proposals to gain leadership and financial support in order to have “permission to plan” and “plan approval”.
- Utilize existing standing committee’s or work groups, as appropriate, to be assigned responsibility for specific Goals
- Plan execution will be impacted by the “3 C’s”; Culture, Capability and Capacity
 - Identify the “Capacity” of the Committee to take on new responsibilities in the Strategic Plan and identify the “Capabilities” that need to be mastered in order to successfully execute the strategic plan. Where lacking determine how to build these capabilities.
 - Recognize that the “Culture” of the organization and/or the Department will impact the work. Determine if there is a Culture issue regarding an area of strategic plan deployment
 - “Culture eats strategy for lunch....daily!”
- A Strategic Plan is Dynamic. It is a work in progress and ever changing. Don’t be afraid to challenge plan content, including goals and tactics, measures and targets over time.
 - Sometimes the measures we expect will tell us something meaningful don’t, and it is appropriate to throw them overboard and find new measures that we reasonably expect will yield the best results.

Appendix 5 - Glossary

- Vision - What we hope to become as an organization, or the envisioned future state
- Mission - Why we exist
 - e.g. The product of a nonprofit organization is its mission
- Values – how we behave, our Guiding Principles, organizational boundaries and standards of behavior
- Strategic Themes - Our critical to success factors or categories that drive the organization to achieving its Vision and Mission
 - An organizing framework for our Goals and Tactics
 - Similar to Balanced Scorecard in concept
- Goals - An observable and measurable end result having one or more objectives to be achieved within a timeframe. What we expect to achieve by executing the strategic plan.
- Objectives- A set of activities that underlie the organization's planning efforts. An objective is a measurable step to achieve the Goal or Strategy. What we need to accomplish over the next 5 Years to move us toward our overall Pillar Goal.
- Tactics - A specific result that a person or system aims to achieve within a time frame and with available resources as related to a Goal or Objective
- Performance Targets - What we expect to achieve, performance or rate of improvement needed, during a given time period, e.g. one year, three years
- Measures - The metrics used to determine progress against targets. How success or failure (performance) against the objectives is monitored.
- Strategy Review Meetings - Planned meetings for the purpose of monitoring strategy performance-to-plan
 - Between Administration, Management and Staff as appropriate
- Line of Sight - The ability to view the cascade of Goals and Tactics across the tiers of an organization, both up and down, to foster organizational alignment.
- Planning Horizon – The period of time covered by the Strategic Plan