

# Strategic Plan

*(Developed in 2019 for implementation from current to 2022)*

Rotary Club of Haddonfield ~ Rotary Club of Haddonfield Foundation



Why is strategic  
planning important  
for our Rotary  
Club?

Strategic Planning defines our vision for the future, sets goals to achieve the vision, and identifies strategies to reach the goals. Over the next three years...

***we are sustaining the Club  
for the future.***

# Process

2018-2019

- In 2018, RCH and RCHF Boards formed Strategic Planning Committee and welcomed interested members
- Over next year, Committee focused first on mission and vision, then dove into strengths, weaknesses, threats and opportunities for both organizations
- There were many thoughtful, dynamic discussions that considered the health of the club, which resulted in a series of emerging themes
- The Committee also considered input from Club members and others, which was provided through discussions, surveys and group activities
- The Committee met regularly for over a year to identify and focus on critical issues, set priorities, formulate goals and recommend action plans

# Our Mission

*Why are we here?*



# Mission Statements

## Rotary Club of Haddonfield

The Rotary Club of Haddonfield members unite to facilitate positive change in local communities and around the globe.

## Rotary Club of Haddonfield Foundation

The Rotary Club of Haddonfield Foundation supports educational and charitable projects to advance higher and vocational education, to promote peace, and to alleviate poverty and hunger, locally and internationally.

# Our Vision

*What are our aspirations?*

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# Vision Statements

## Rotary Club of Haddonfield

Together, we envision a world where people unite to take action that creates lasting positive change in our local communities and around the globe.

## Rotary Club of Haddonfield Foundation

The Rotary Club of Haddonfield Foundation shall be recognized as a community resource that supports educational and charitable projects in accordance with the values and priorities of Rotary International and the Rotary Club of Haddonfield.



# Areas of Identified Risk

## Membership

1. Membership in service organizations in general is down, including Rotary.
2. Clubs need to consider new ways of doing things to attract future members and retain current members.



## Fundraising

1. Corporate giving has changed with less sponsorship dollars available to support club projects; Rotary must find ways to become known for our charitable work and stand out among many charities.
2. New ways to raise funds need to be activated.



Strategic Planning Process

Emerging Themes

The committee members identified several key areas of focus:

- **Membership Engagement and Retention**
- **Membership Recruitment**
- **Public Image**
- **Fundraising and Building Endowment**

While recognizing each of these areas overlaps with the others to a great extent.

Membership

Engagement /Retention

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# Membership Engagement /Retention

We are losing members for a variety of reasons -- both controllable and uncontrollable:

**Controllable**, such as - new member's expectations not met; new member not feeling welcome or engaged; club programs not interesting or relevant; dues increases; etc.

**Uncontrollable**, such as - member moves away; member work schedule changes to conflict with meetings; medical or family responsibilities, etc.

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*We have many opportunities to improve controllable retention with focus on member engagement and club flexibility.*

# According to Rotary International

Top three reasons for leaving Rotary:

- Cost or time constraints
- Club environment and culture
- Unmet expectations

## PROSPECTIVE MEMBERS

### •••• WHY THEY JOIN ••••

Participate in local service projects 40%

Participate in International service projects 31%

Gain personal development and training opportunities 27%

#### GENDER



#### AGE



### •••• WHAT YOU CAN DO ••••

Contact them when they express interest

Give them a positive orientation experience

Engage them in local and international service projects

## CURRENT MEMBERS

### •••• WHY THEY STAY ••••

Participate in local service projects 46%

Enjoy friendship and fellowship 41%

Connect with people outside their work and social circles 29%

#### GENDER



#### AGE



### •••• WHAT YOU CAN DO ••••

Display leadership in action

Be a vibrant club

Engage people at all stages of membership

## FORMER MEMBERS

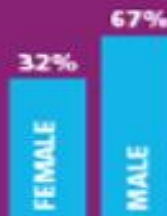
### •••• WHY THEY LEAVE ••••

Cost or time constraints 34%

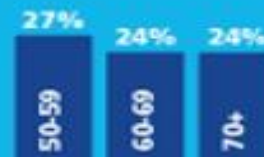
Club environment and culture 32%

Unmet expectations 17%

#### GENDER



#### AGE



### •••• WHAT YOU CAN DO ••••

Assess your club

Work on building a diverse club

Practice flexibility and innovation

# Membership Recruitment

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# Membership Recruitment

Service organizations and volunteerism in general is declining nationally as society is changing and younger generations have different interests. Clubs must find a way to adapt to changing times, without losing their basic core values or traditions members hold dear.

*We have opportunities to expand our network of candidates through targeted proactive outreach. We should expand membership diversity in terms of age, race, religion, vocation, etc., by reaching out and being open to making any necessary adjustments to address barriers to involvement.*

Public Image

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# Public Image

Even with all the good Rotary does in the world, we are not known for that. Our Club is connected more to our fundraising events and requests for donations, than we are for what we do with funds raised. We must change our image and become known for the good work we do in order to attract new members and future fundraising support.

*Utilizing the RI “tool box” routinely for resources and developing partnerships with others could be very helpful in building awareness. More attention needs to be paid to becoming better known in our own community.*

# Fundraising

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# Fundraising/Increasing Endowment

Businesses are changing the way they support community organizations; in many cases turning over responsibility to foundations that have a more competitive and comprehensive grant application process, with more focused giving restrictions. New ways to raise funds to support charitable giving, scholarships, special projects are needed.

*Fundraising needs to be embraced by everyone in order to achieve results. Donor prospects beyond members and other ways to raise funds must be developed in order to meet goals.*

# Action Planning

# Member Engagement and Retention

## Club Service/Meetings Committee

- Create a welcoming environment that embraces diversity through open communication, flexibility and volunteerism
- Plan more hands-on projects for members and other club-related volunteers
- Look for new ways to host meetings to get to those who cannot attend current schedule (e.g., one evening meeting a month; one service project “meeting” a month)
- Help new members connect with areas of interest in engaging with the club (e.g., local or international service projects, special events, leading a team, professional development, etc.)
- Assign a mentor to new members; make sure mentors are prepared and have resources to perform role
- Make sure to create positive first impressions; welcome, share impact, provide resources and introductions
- Use website to improve access to resources, communication and public image
- Host events or special meetings that are oriented to spouse and family involvement

# Member Recruitment

## Membership Committee/Communications Committee

- Activate Membership Committee to proactively work to attract and sign up new members
- All members post or share speakers and events on Facebook and other social media
- Build partnerships with other Rotary and other groups to provide a pipeline to membership (e.g., Interact Club, Roteract Club, youth service organizations, Peace Corps)
- Do more to improve visibility in Haddonfield through membership recruitment and communications
- Improve diversity as to age, gender, race, religion, vocation and target recruitment efforts accordingly
- Promote programs/speakers ahead of time locally and encourage “invite a guest” opportunities
- Offer other types of memberships that do not require attending meetings or offer other flexible membership requirements



# Public Image

## Communications Committee

- Do more Haddonfield service projects to improve visibility in town
- Partner with schools, etc. to do larger and more Boro-wide projects
- Establish a joint Communications Committee to work for RCH and RCHF
- Announce programs in Haddonfield Today, Boro website, etc. ahead of time
- **Brand RCH and RCHF** fundraising along RI's Areas of Focus; for example around **support of children and families**; or support of youth development and education
- Adopt a long-term project ("Adopt a Mission") such as we did with Fellowship House and make it known in area
- Find ways to use technology used by younger people to improve connections
- Utilize membership and image tools coming from Rotary International to support Club Service and Membership goals routinely
- Make sure we are represented on the Haddonfield Public Library site, as well as any others that might help point our targeted audiences to us

# Fundraising/Increasing our Endowment

- Improve participation and follow-through on projects to achieve results
- Have a professional financial advisor ensure funds are managed and invested properly
- Establish grant-writing process; make sure listed on GuideStar and any other sites that would inform and/or direct funding to RCHF
- Develop tools, materials and processes to activate planned giving initiatives
- Provide educational opportunities and programs for members on Rotary impact and giving opportunities at all levels
- Feature former scholarship winners and other beneficiaries in programs and communications
- Focus on raising endowment while slowing pace of giving for period of time

# Goals and Metrics

Member Engagement and Retention	Member Recruitment	Public Image	Fundraising
<p><i>Goal: To reduce controllable resignations through improved membership experiences and engagement.</i></p>	<p><i>Goal: To increase membership through improved recruitment results.</i></p>	<p><i>Goal: To improve and expand public image in local communities.</i></p>	<p><i>Goal: To build endowment and increase charitable giving to both RCH and RCHF.</i></p>
<p>Data required to measure this goal:</p> <ul style="list-style-type: none"> <li>Membership exit data (number and reason resigning)</li> </ul> <p><b>Person responsible:</b> Administrator</p>	<p>Data required to measure this goal:</p> <ul style="list-style-type: none"> <li>Number new members installed/year</li> <li>Number of guests/mo</li> </ul> <p><b>Person responsible:</b> Membership Committee Chair</p>	<p>Data required to measure this goal:</p> <ul style="list-style-type: none"> <li>Number of posts, photographs, stories, in media or social media</li> </ul> <p><b>Person responsible:</b> Communications Committee Chair</p>	<p>Data required to measure this goal:</p> <ul style="list-style-type: none"> <li>Level of RCHF endowment each quarter</li> <li>Level of RCHF and RCH donations each quarter</li> </ul> <p><b>Person responsible:</b> Administrator</p>
<p><b>Metric 1:</b> Number controllable resignations seen per year: Year 1: Take Baseline FY 20 Year 2: Decrease by 5% FY 21 Year 3: Decrease by 8% from base year</p>	<p><b>Metric 1:</b> Number of new members installed each quarter. Year 1: 5% more than FY 20 Year 2: 5% more than FY 21 Year 3: 5% more than FY 22 Total Net Increase in Club Membership in 3 Years: 15%</p>	<p><b>Metric 1:</b> Number of positive public relations in all mediums (Social Media posts, Newspaper photos or articles in other organizations' newsletters, etc). Year 1: Take Baseline Year 2: 10% more than FY 21 Year 3: 10% more than FY 22 Total increase in 3 years: 20%</p>	<p><b>Metric 1:</b> Amount of annual donations to both RCH and RCHF in any way (e.g., event, annual donation, planned gift, etc.). Year 1: Take baseline Year 2: 10% more than FY 21 Year 3: 10% more than FY 22 Total increase in 3 years: 20%</p>
	<p><b>Metric 2:</b> Number of meeting guests each month Year 1: Take Baseline Year 2: Increase by 10% over 2019-20 Year 3: Increase by 10% over 2020-21 Total Net Increase in 3 Years: 20%</p>		<p><b>Metric 2:</b> Level of RCHF Endowment each quarter Year 1: Establish structure and materials to grow planned giving Year 2: 5% more planned gifts est. than FY 21 Year 3: 10% more planned gifts est. than FY 22 Total Net Increase in 3 Years: 15%</p>

Just think...

# The Power of Rotary

With just **563** paid employees globally, Rotary International annually mobilizes volunteer efforts equivalent to nearly **27,000 full-time paid workers**.

Study also revealed that the efforts of Rotary volunteers save communities an estimated **US \$ 850 million** in service costs per year.

*Johns Hopkins University Center for Civil Society Studies and  
Rotary International Research Study 2019*

# Strategic Planning provides a road map to achieve our vision

*-- it is up to us whether we follow it,  
adjust it, or put in a drawer*

# Special thanks to the following members who participated in the Strategic Planning Committee discussions

Skip Bean, Past President

Mary Ann Bigelow, Chair, RCHF

Jeff Clark, Member

Pamela Fisk, President

Deborah Garwood, Secretary

Karen Hagerman, Immediate Past Chair,  
RCHF

Charles Hart, Immediate Past President  
RCH

Assad Khoury, Fundraising Director

Vinny Mayher, Past President

Gerry Nanos, Treasurer

Nick Nicolay, Past President

Arnie Olt, Past President

Sharon Reel, Secretary RCHF

Kathy Ross, Past President

Denise Stuart, Vice President

**Rotary**

