
NW Austin Rotary Club

Five Year Strategic Plan

2022-2027



APR 28, 2022

Northwest Austin Rotary Club

Authored by: Bob Allen, Ajay Badhwar, Brigitte Benquet, Rick Hoffman, Steven Welch (chair)

Executive Summary

Engaging a diverse membership, building a brand

Rotarians, our motto is “service above self”, where we strive to provide service to our community and others through living daily the Four-Way Test. We further look to build relationships with one another and have “fun” in the process!

-Club President Rick Hoffman 2021-2022

“If you’re not having fun – you’re doing something wrong!”

-Groucho Marx

For more than 110 years, Rotary International’s people of action have used their passion, energy, and intelligence to act on significant local and global projects. This club’s purpose is to help improve the quality of life for our communities locally and internationally. Our major activities currently revolve around building youth leadership, reducing food insecurity and improving education quality. By 2027 the Northwest Austin Rotary Club will have grown in diversity and impact with members volunteering service in addition to giving financially through individual gifts. Our club focuses on a large annual fundraiser to enable local community-focused activities and international service projects. Members will participate in club meetings both in-person and virtually. Our Service Above Self reputation will be established by the success of our service projects. We will use our Wealth of Experience among our members to build Intentional Recruitment, overcoming our Technology weaknesses to address the changing Demographics of our community. We have 6 goals focused on the following areas: membership, fundraisers, fiscal responsibility, service projects, foundation and marketing. Our Key Performance Indicators are: Engaged Membership, Diverse Membership, Brand and Fundraising. We are looking for involved, diverse, community leaders who are looking to make a substantial impact in the local and global community.

Summary of our Purpose

Rotarians make an impact locally and internationally through service projects and fellowship. This club's purpose is to help improve the quality of life of our communities locally and internationally. Currently our major activities revolve around building youth leadership, reducing food insecurity, and improving education quality. We also partner internationally to help build libraries in Uganda and provide solar lighting in Belize to allow adults and children to read at night. We support polio eradication efforts throughout the world. We help build water wells in Kenya and Ethiopia in our efforts to improve global health. We are ~100 engaged community leaders who actually walk our talk with tangible projects to serve our world.

Our current 5 avenues of service that have been selected by this club are:

1. Club Service – club socials and meeting logistics for engaged membership
2. Community Service – food pantry, support for local community initiatives
3. Vocational Service – educators recognition and scholarship awards
4. Youth Service – food insecurity, youth leadership, international exchange
5. International Service – libraries, lighting, water wells

Background of Rotary International

Solving real problems takes real commitment and vision. For more than 110 years, Rotary's people of action have used their passion, energy, and intelligence to take action on significant local and global projects. From literacy and peace to water and health, we are always working to better our world, and we stay committed to these ends.

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.



Rotary members believe that we have a shared responsibility to act on our world's most persistent issues. Our 46,000+ clubs work together along our priorities, summarized in our 7 avenues of service:

Rotary International's 7 avenues of service:

- Peace and conflict prevention/resolution.
- Disease prevention and treatment.
- Water and sanitation.
- Maternal and child health.
- Basic education and literacy.
- Economic and community development.
- Support the Environment.

Mission, Vision, and Values

Club Vision:

By 2027 the Northwest Austin Rotary Club will have grown in diversity and impact with members volunteering service in addition to giving financially through individual gifts. We focus our fundraising on a large annual fundraiser that enables our local community-focused activities and international service projects. Our members participate in club meetings both in-person and virtually. Our Service Above Self reputation is established by the success of our service projects.

Club Mission:

To lead the way in promoting strong fellowship and undertaking life changing international and community projects through vibrant club meetings, service projects, and financial contributions (following the Six Avenues of Service).

Our Club Values and our Member values align with the 4-Way Test.



SWOT (our comparative strengths, weaknesses, opportunities, and threats)

<p>Strengths</p> <ul style="list-style-type: none"> ● Wealth of experience among members ● 4 Way Test, apolitical, areligious, peace orientation ● Record of accomplishments of Rotary International (network, foundation) and our club ● In-person fellowship with growing virtual reach ● Number of members ~100 ● Strong fundraising, ability to do projects 	<p>Opportunities</p> <ul style="list-style-type: none"> ● Global brand but not well marketed ● Intentional recruitment <ul style="list-style-type: none"> ● International conflict resolution/peace through service/advocacy for international understanding ● Enhance in-person collaboration at facilities or virtually (internet) ● Partnerships with 3rd parties in community to build on strengths ● Austin's dynamic, diverse, young, creative young community ● Endowment fund / community foundations?
<p>Weaknesses</p> <ul style="list-style-type: none"> ● Not technologically savvy nor equipped with minimal competence ● Not age diverse/missing dynamic young membership/appearance of "old man" club ● Network of membership appears static; based on current membership (recruitment is not intentional nor directional) ● Not gender diverse ● Lack of cultural, racial, ethnic diversity ● Poor brand marketing ● Cultural change adversity not following demographics of community ● Accountability (walk the talk) ● Not nimble, bureaucratic 	<p>Threats</p> <ul style="list-style-type: none"> ● Current demographic, attrition by age <ul style="list-style-type: none"> ● Corporate employee volunteer activities ● Kickstarter-like (fractional donations to personal passions) ● Community foundations ● Other service clubs gaining traction (RI in USA not growing)

Goals

Goal 1 – Service projects – directing funds and participation towards the most important aligned with goals

Goal 2 – Marketing and Branding – build brand awareness in the community through social media, events, publicity

Goal 3 – Membership – intentionally targeting underrepresented groups and community leaders, guiding new members, engaging members (social)

Goal 4 – Fundraisers – execute fundraiser(s) that continue to increase revenue year over year, 100% Par Producers.

Goal 5 – Amplifying Funds – continued support of RI Foundation, club 501(c)3

Goal 6 – Maintain fiscal responsibility – Maintain spending via budget

Key Performance Indicators / Measures

Key Performance Indicators or Measures are a useful way to measure the change required to help us reach our destination targets for 2027. There is no particular order to these elements, all are critical to reaching our destination.

KPIs	Description, Key actions, Measure	From 2022	To 2027
Engaged Membership, showing up	<p>As measured by: % of members attending meetings, social and service projects, maintain membership count</p> <p>Quarterly report of each member if they attended >60% of meetings per quarter in person or virtually AND one social event per quarter AND one service project per quarter. Reported by Club Secretary or Membership Chair.</p> <p>ACTION: Need to develop a measure in 2022 to be a holistic list of members that participate in all three elements.</p>	33% Estimate of average meeting + social + service attendance	50%

Diverse membership	<p>As measured by % of members female and < 60 years old</p> <p>ClubRunner only measures M/F and age, quarterly report. Ethnicity important but maybe manual measure, qualitative.</p> <p>ACTION: develop a more comprehensive view of diversity measures to include visible minorities</p>	<p>20%</p> <p>Estimate of females < 60 years old</p>	50%
Brand	<p>Number and frequency of mentions of our club activities in various media, measured monthly quantity, likes and mentions of quality posts.</p> <p>ACTION: develop a more comprehensive measure moving forward for how effective our brand/marketing is to reflect Awareness.</p>	20 hits/month	>100 hits/month
Fundraising	<p>As measured by \$ generated (revenue) by large annual fundraiser and 501(c)3 giving</p>	<p>\$134k</p> <p>\$0K</p>	<p>\$168K</p> <p>\$35K</p>

Target Audience (groups, partner organizations, etc)

We are looking for involved, diverse, community leaders who are looking to make a substantial impact in the local and global community. We want members who are dedicated to: truth, fairness, goodwill to others, and equity and will be non-religious and apolitical within our club activities.

Target recruitment efforts toward	Seek to add members by
<ul style="list-style-type: none">• Age group - ages 30 - 50• Emphasis toward female• Open/encourage to ALL races and nationalities• Wide range of Occupations and types of business (vocations/classification diversity) - Managers, Executives, Teachers, Business Owners, Professionals...	<ul style="list-style-type: none">• Partnership with Organizations - i.e.: SCORE, Jr Achievement, HCCM...• Who is involved, what makes a member: young entrepreneurial-minded folks• What makes a good partner organization / funding recipient• Where we participate / geography vs local

How to attract, retain members

Directionally we are hoping to move our membership into fostering deeper relationships among our members and be more accommodating/beneficial to all.

- Our Membership goal 90-110 members
- Engage and offer numerous service projects that appeal to different levels of interest/abilities
- Social events that are affordable for ALL members and their families, especially younger families.
- Expectation for members to bring new members (Blue Badge process) Be one, bring one” - ask/seek out target market names and business associates.

- Expectations of members (financial vs participation) Encourage all to meet minimum levels of financial (Fruit sale-PAR) and activities (one service project per quarter)
- Exit interviews / surveys develop exit survey via Survey Monkey system for ease of responses to understand why our members are leaving.
- Do we need Success Stories? Scholarships, solar lights, (club specific) Lead by doing/showing in our weekly meetings, facebook page and website. May help build our brand.

Team Leadership / Committees / Pipeline

Encourage committee leaders to commit for 3 years of leadership and enlist members on a rotational basis to stay 3 years also. Having a rotational committee will help with new leaders being identified to lead the committee.

	2021-2022	2022-2023	2023-2024	2024-2025
President	Rick Hoffman	Debbie Tam	Josh Reeley	TBD
President Elect	Debbie Tam	Josh Reeley	TBD	TBD
Past President	Lee Easter	Rick Hoffman	Debbie Tam	Josh Reeley
Secretary	Greg Rabaey	David Powers		
Treasurer	Amity Mercado	Amity Mercado		
Committee Chairs:				
Youth Services	Josh Reeley	Ajay Badhwar		
Internat'l Services	Audrey Cochran	Audrey Cochran		
Community Services	Andy McFarlane	Virginia Gini Craig		
Club Services	Kristen Stephens	Kristen Stephens		
Vocational Services	Laura Goettsche	Laura Goettsche		

Key Elements of Tactical Plan

The Rotary Club of Northwest Austin will continue to operate with a balanced budget ensuring our Operational Budget covers our meeting and club activities, and our Charitable Budget allows contributions to recipient organizations and allows us to do what we know is right. Every year we will maintain or grow our Endowment fund, and if a one-time draw is taken, a structured plan to pay it back is in place. There are many factors that are accounted for in the balance between the newly formed 501(c)3, RI Foundation, Club Endowment, and fundraising/distribution.

The Rotary Club of Northwest Austin will continue to host meetings weekly on Friday mornings at the Balcones Country Club, evolving to improve our hybrid meeting experience and maintaining and improving our in-person experience.

The Rotary Club of Northwest Austin will continue to partner with other local and beyond Rotary Clubs to further the good work done by others, through service projects or through contributions.

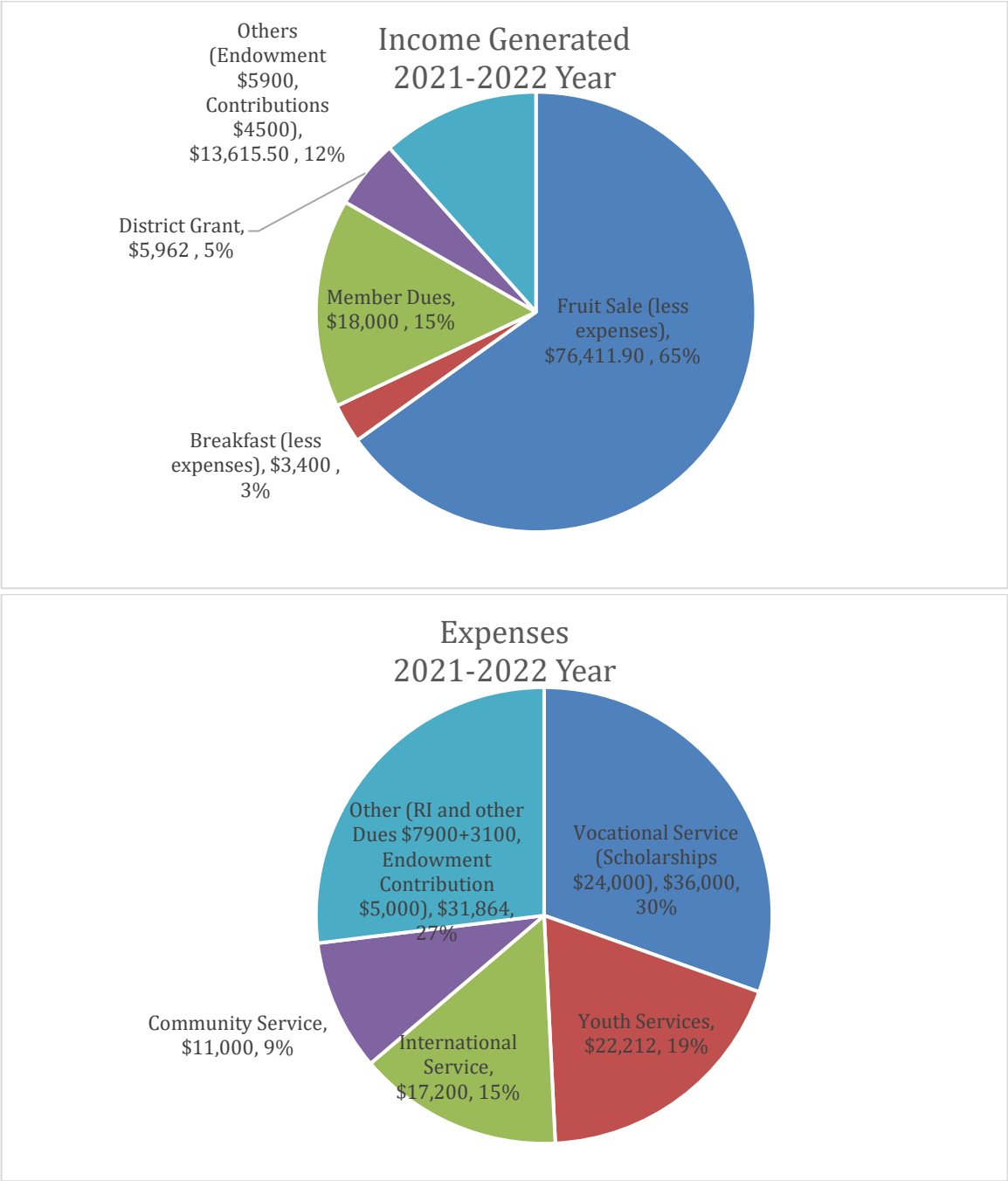
We will continue to operate in alignment with the Rotary International Seven Avenues of Service with our club currently having selected Five Avenues of Service with the following intentions:

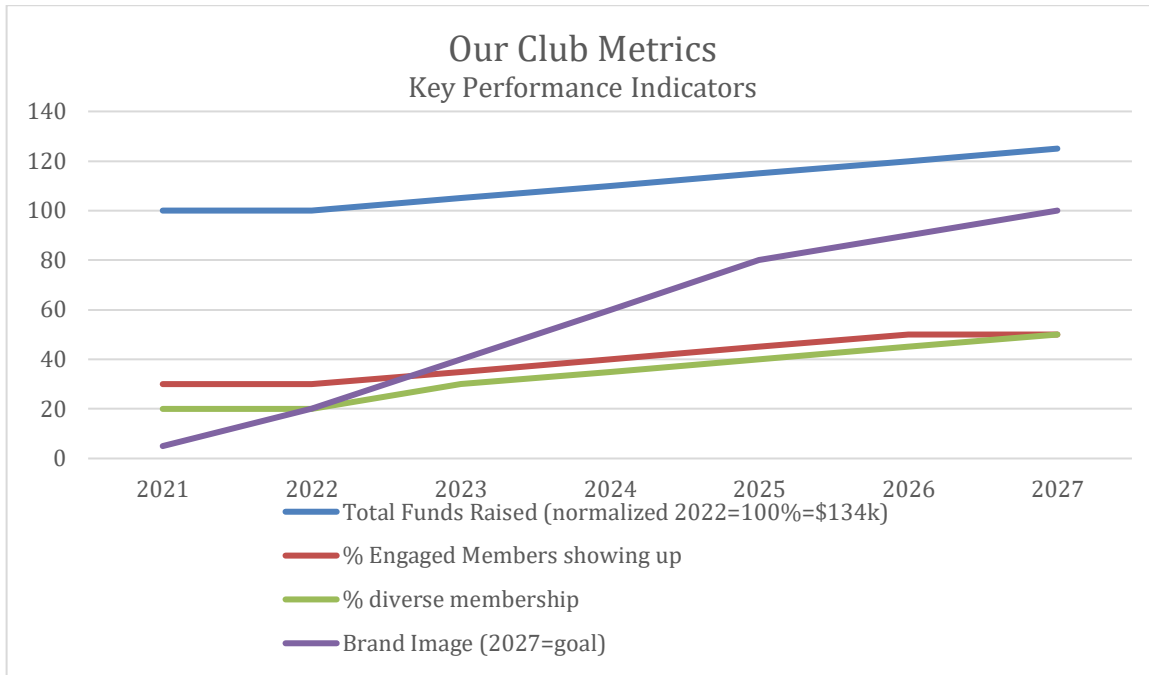
- Youth Leadership - to foster Rotary values in youth in the community
- Community Service and Scholarships – including support structures for at risk youth and recognizing accomplishments among youth
- International Service - to strengthen international outreach to support peace
- Food programs – better define food insecurity intentions to improve impact
- Club Service – engagement is key, hybrid meetings, branding, all members are brand ambassadors

We will emphasize the benefits of matching funds through Rotary International, local Rotarian matching, corporate matching, and endowments to ensure our dollar goes further.

Financial Summary / Budget / Breakdown

Is it the right balance to reach the goals we want?





Path Forward

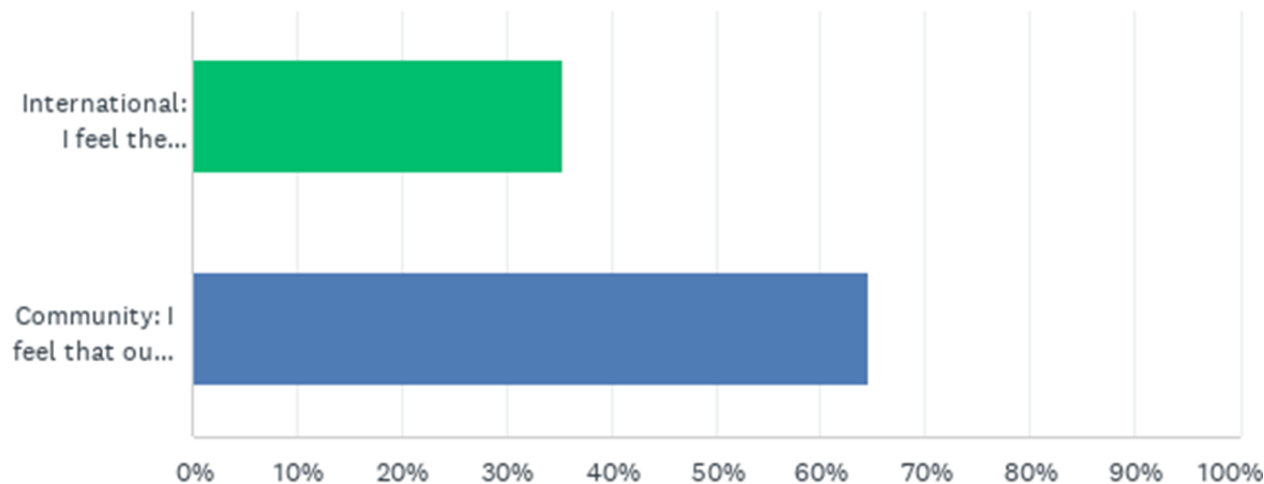
The strategic plan committee recommends that:

- An evergreen committee (+4 members + president) and consider a rotation through members
- Reviewed annually, reflecting data of last year what needs to change
- Survey was well received, understand how to develop additional feedback
- Actions are recommended in the KPI section to measure what really matters

Appendix

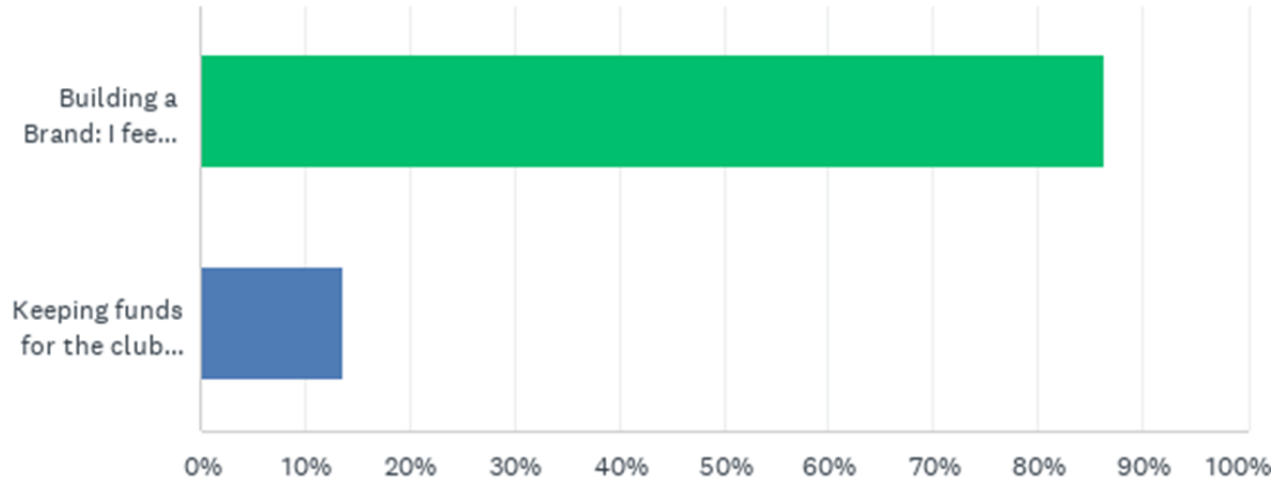
Appendix - survey data

Question 1 - balance International vs Community



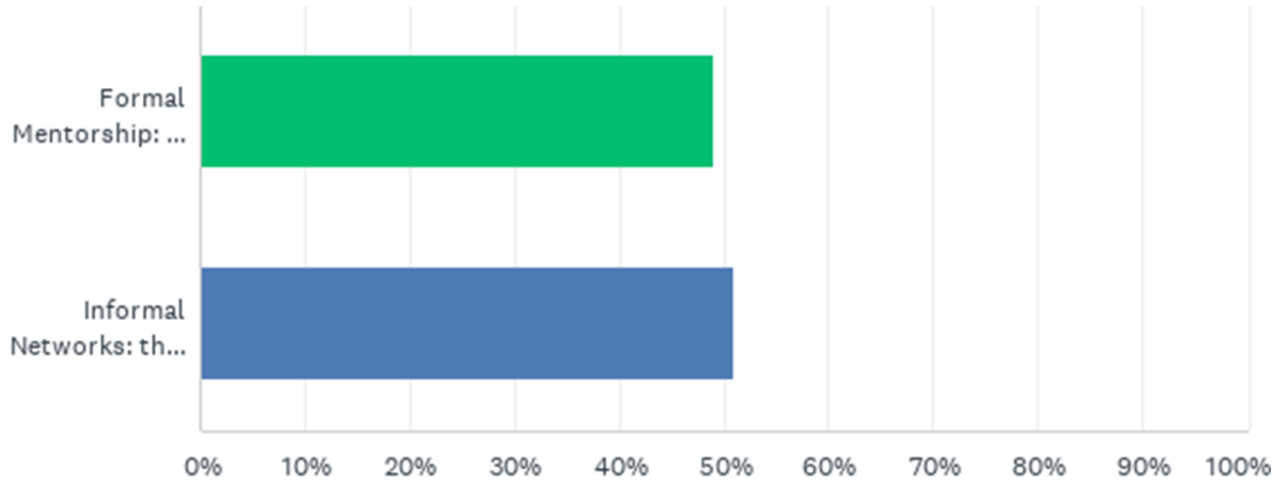
ANSWER CHOICES	RESPONSES	
International: I feel the purpose of Rotary is to benefit the world to make it better through directing > 20% of the club fundraising dollars from our charitable budget to be directed to International and/or outside our community.	35.29%	18
Community: I feel that our Rotary funds are mostly generated from our local community and >80% of the club fundraising dollars from our charitable budget should be directed back to our local community (Austin or Texas).	64.71%	33
TOTAL		51

Question 2 - Publicity



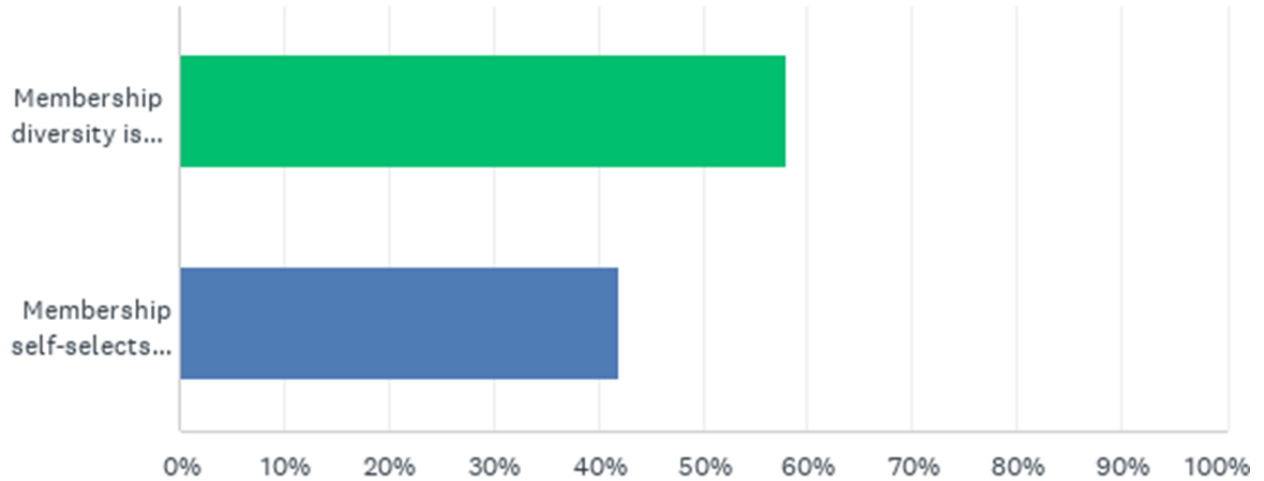
ANSWER CHOICES	RESPONSES	
Building a Brand: I feel we need to raise our visibility of the Rotary Club and Rotary overall through newsletters, social media, and program/people/project success stories. We should direct >2% of our operational budget to build our brand.	86.27%	44
Keeping funds for the club meeting experience: I think we are doing well adapting to the changes required to get visibility in the community through our current efforts. It's important to drive word-of-mouth and keep a lower key, and direct <2% of operational funds to publicity keeping more funds going to the meeting experience.	13.73%	7
TOTAL		51

Question 3 - Formal Mentorship



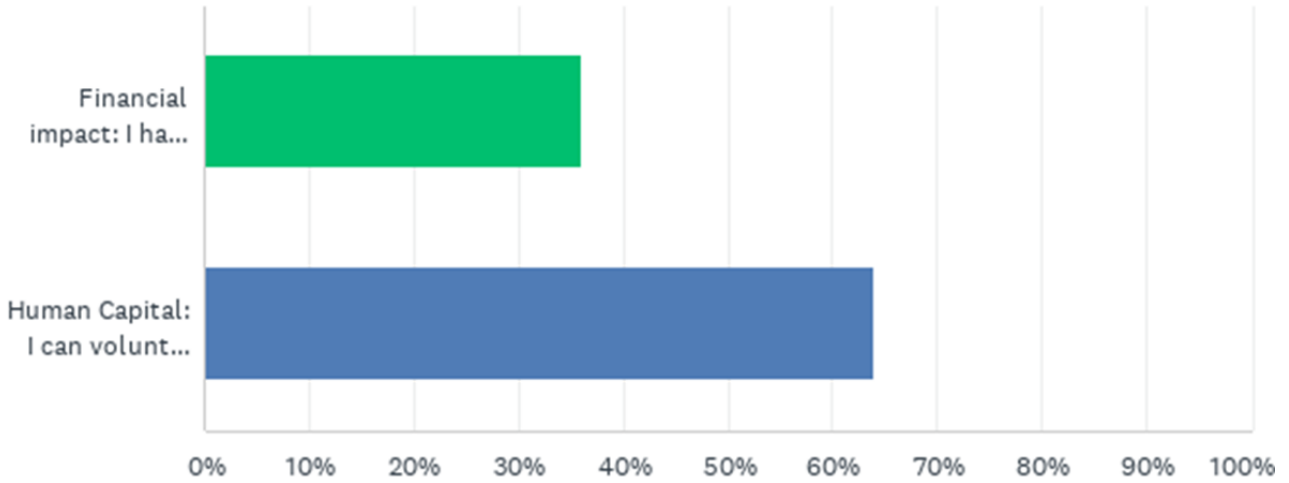
ANSWER CHOICES	RESPONSES	
Formal Mentorship: we should establish a formal mentorship program for all members, linking various experiences from members. Building a formal mentorship program in our strategic plan will help with a pipeline of leadership and engagement in programs. It would mean that each member has an expectation to invest time to be a mentor.	49.02%	25
Informal Networks: there is a lot of experience in the club and our new member process informally connects members to the right committees already. Members take on additional responsibility to help new members as they can and where there is passion. A formal mentorship program beyond our Red Badge program may not provide much additional benefit as our new member retention is already high.	50.98%	26
TOTAL	51	

Question 4 - Demographics



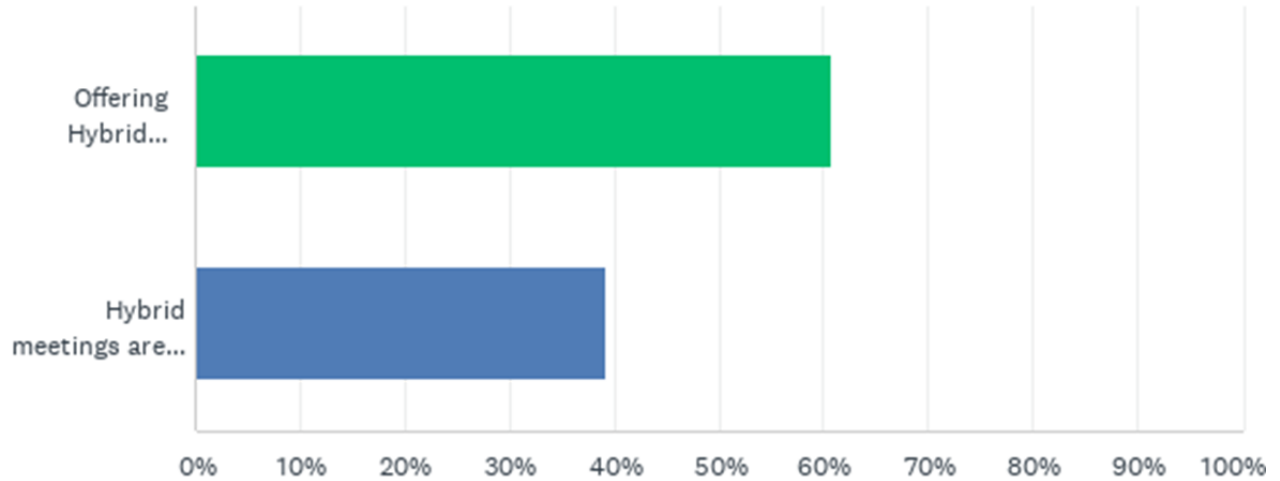
ANSWER CHOICES	RESPONSES	
Membership diversity is important: actively recruit additional diversity, preferentially biasing to under-represented groups in our club <40 years old, women, visible demographics, allocating funding and a key metric.	58.00%	29
Membership self-selects: welcoming all applicants of course, and gradually our membership will reflect the diversity of our networks. I don't think we should have measures of our diversity, administratively it will have challenges, and funds should stay with our meeting experience.	42.00%	21
TOTAL		50

Question 5 - Fundraising vs Service



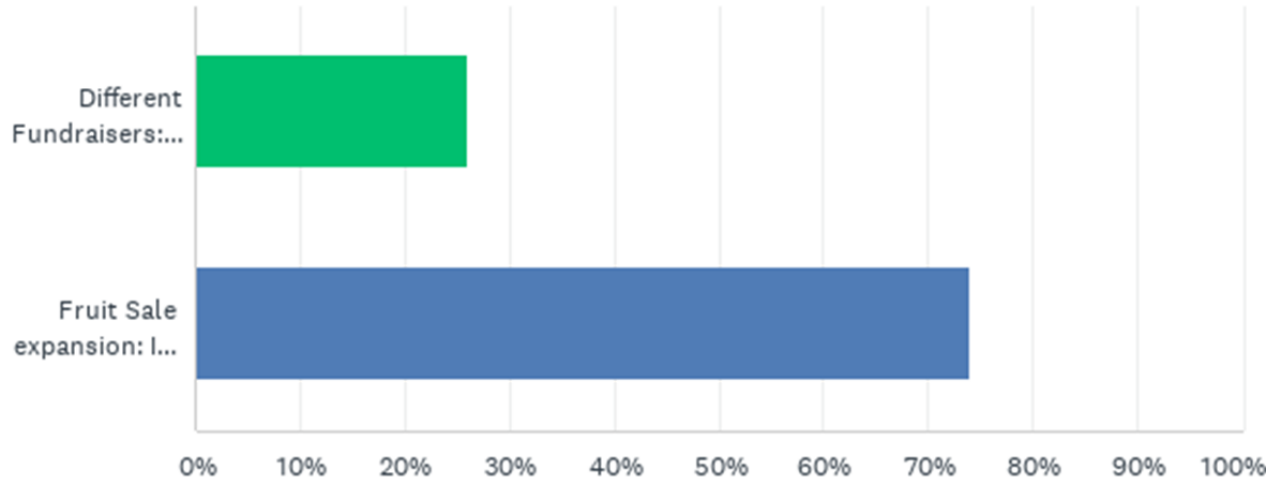
ANSWER CHOICES	RESPONSES	
Financial impact: I have worked hard to be in a position to be able to write a check where that money can make a major impact to the programs we select. My in-person efforts can't be as effective as my financial contributions, and I shouldn't be measured by my physical service. I will volunteer where I can.	36.00%	18
Human Capital: I can volunteer my efforts much easier than I can write a check. I also think it's hugely impactful to show Rotarians in Action in our local community as it builds attention. A check is nice, but our people service is what gives us the human connection to our community. We should keep track and report physical service by members, in addition to keeping track and reporting financial contributions.	64.00%	32
TOTAL		50

Question 6 - Hybrid Meetings



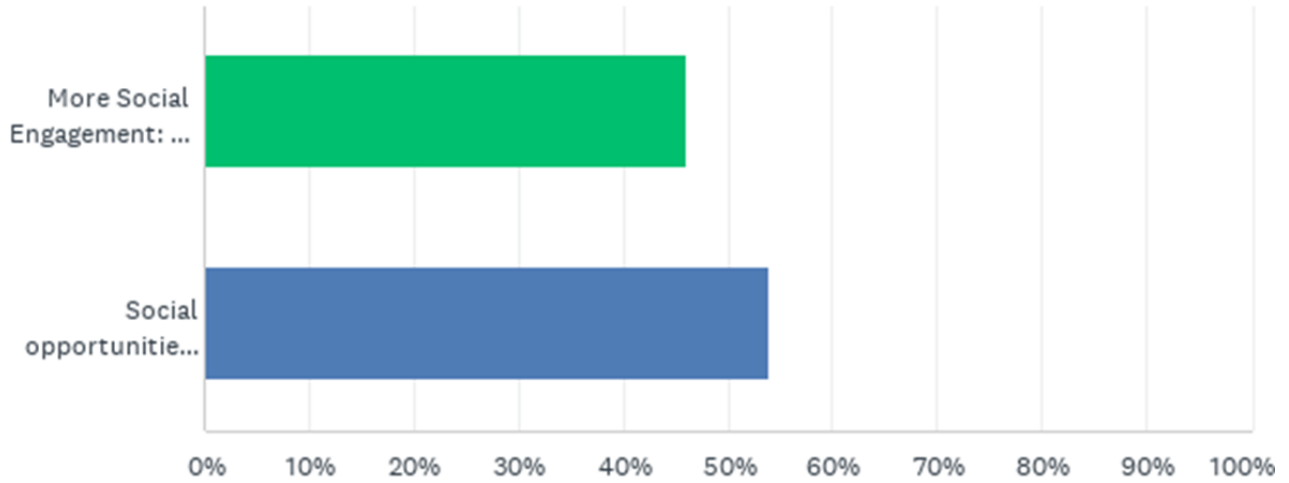
ANSWER CHOICES	RESPONSES	
Offering Hybrid Meetings: times have changed and we need to be in a position where people can attend in person or virtually. We may also risk losing members. We should measure attendance virtually or in person equally and allocate up to \$10,000 over the next 2 years to build virtual meeting services – improved microphones, web cameras, virtual meeting platform accounts, designating an online meeting facilitator, 50:50 online – while not distracting in person attendees.	60.78%	31
Hybrid meetings are temporary, in-person is necessary: I see that we will need to get back to 100% in-person meetings when the pandemic winds down. In person collaboration and seeing each other face to face is the magic of Rotary fellowship. We should preferentially measure in-person attendance, set in-person obligations for members and communicate this to prospective members. We may waive in-person requirements until the pandemic winds down.	39.22%	20
TOTAL		51

Question 7 - Number of Fundraisers



ANSWER CHOICES	RESPONSES	
Different Fundraisers: I feel we should diversify our larger fundraisers to add in another larger fundraiser in addition to the Fruit and Candy Sale. Our community impact funding needs continue to expand and we're reaching a limit on how much we can generate from the Fruit Sale alone. Our smaller fundraisers don't bring in much, let's diversify.	26.00%	13
Fruit Sale expansion: I feel the Fruit and Candy Sale is working quite well and with some additional attention we can continue to earn more. Recent improvements are working well and having one large fundraiser allows us to focus attention to reach our goals. Spreading ourselves too thin may reduce our fund generation from the Fruit Sale.	74.00%	37
TOTAL		50

Question 8 - Social Engagement



ANSWER CHOICES	RESPONSES	
More Social Engagement: I feel that the social engagement between Rotarians is important for our fabric in the club. We should allocate > 4% of our operations budget for more social engagement opportunities. We should be measuring how people are engaging and expand options for social interactions outside of formal club meetings. This is important given the challenges recently of meeting face to face. Ensuring it's family friendly and outside of the club is important.	46.00%	23
Social opportunities are ample: I feel that more and different programs aren't required. We have opportunities for Rotarians in the club and other clubs, Rotarian families, and the ability to participate in many ways. I agree that social engagement is important but I don't think we should have more funding from dues allocated to more social events. We already allocate 4% of our operations budget to social programs.	54.00%	27
TOTAL		50