

WC ROTARY STRATEGIC PLAN JULY 2013 – JUNE 2016

This plan was developed and approved by the Board of the West Chester Rotary Club and is intended to guide the activities of the club over the next three years.

We recommend that the report is reviewed each year and a new set of annual objectives is developed. This process should happen in January or February so that the incoming President can use the plan in the PETS training that is scheduled for the March before their term begins.

SERVICE AND FUNDRAISING

VISION STATEMENT – WHERE WILL WE BE IN 3-5 YEARS?

The club remains focused on being a service organization and will maintain a healthy balance of providing service and raising funds for community organizations and international projects.

STRATEGIES

- Develop club-wide communications around our service and fund raising efforts
- Ensure that the Club can fund our philanthropic efforts well into the future

OBJECTIVES JULY 2014-JUNE 2015

1. **Calendar of activities:** Publish an annual calendar of activities
 - Lists what we do and why
 - Communicates that not everyone has to do everything
2. **Communicate clear service/fundraising message:**
 - Communicate a “Give generously and Do what you can” message
 - Use a Time/Talent/Treasure framework so people choose how they can best give and feel valued for that giving
3. **Pilot new visible service-only project tied to Chili Cookoff:**
 - Making an impact that is visible to the community
 - Spring event that kicks off Chili Cookoff season
 - If pilot does not work we embrace the Cookoff as our signature event
4. **Rainy Day Fund:** Consider using funds from past chili-cookoff as contingency for future years if cook-off is cancelled (scholarships and other annual fundraisers such as Warm Coats)

SERVICE & FUNDRAISING - YEAR ONE ACTIVITIES

ACTIVITY	COMMITTEE	TIMEFRAME	STATUS
1a. Create calendar (use Rotary) – have one version for members and one for president	John (Pres)	July 1	Draft created.
1b. Determine ongoing process for maintaining calendar	Past-president or at-large board member	Ongoing	
1c. Present calendar to members “Customize your Rotary experience/Customize your calendar” (potential program)	Rob’s program Members engage	July	
2a. Service & fundraising committees incorporate “Give generously and do what you can” message	Service/fundraising committee chairs	Ongoing	
2b. Membership, Rotary Info and Assimilation use message in orientation (“Customize your Rotary experience”)	John/Rob/Katie meet with chairs Members engage	Ongoing	
3a. Pilot spring clean-up day to be broadened to involve Chili Cookoff team and mark Cookoff season start	Denise to co-chair with Mac (?)	March board meeting	
4a. In next budget include 5k for reserve fund (from Chili Cookoff)	Rob (PE) and Tim (Treas)	Finalized in July	
4b. Consider Gala or other opportunities for fundraising (or other opportunities)	Rob (PE)	Ongoing	

MEMBERSHIP, FELLOWSHIP AND ENGAGEMENT

VISION STATEMENT – WHERE WILL WE BE IN 3-5 YEARS?

The Club is made up of members who embrace the 4-way test and the values of service and fellowship. Our club has over 100 diverse members who are engaged, passionate and community minded.

STRATEGIES

- Recruit and retain quality members (as defined in our mission) to maintain our current membership levels
- Be intentional about ensuring that the membership represents the demographics of our community
- Encourage fellowship and engagement of all members

OBJECTIVES JULY 2014-JUNE 2015

1. **Recruitment:** Focus on recruitment of members under 35 years of age
 - Provide incentives for that age group (maybe reduced club fee)
 - “Customize your Rotary Experience” as a framework to educate them about the club and to engage them
 - Identify and recruit vocations lacking in membership
2. **Vetting/Education process:** Have a strong vetting process that allows the member to get to know the club culture and expectations. This will allow them to self-select out before becoming a member and dropping after they realize what it really means to be an active member of our club.
 - Ensure that potential members get introduced to board members
 - Have Assimilation present a suggested list of orientation activities
3. **Assimilation:** Customize your Rotary experience with mentor
4. **Deepening relationships:** Increase the internal programming we do, especially re-classification talks
5. **Measure success:** by number of members and level of engagement (define engagement)
6. **Emphasize the 4-Way Test:** Regular review of 4-way test at least once a month

MEMBERSHIP, FELLOWSHIP & ENGAGEMENT - YEAR ONE ACTIVITIES

ACTIVITY	COMMITTEE	TIMEFRAME	STATUS
1a. Develop recruitment strategy reflecting diversity of our community including vocation	Subset of Membership Committee with Matt H.	September	
2a. Recommend switching to Info Session before Board vote so new member recommendation comes from Membership Committee	Membership and Rotary Information	July	
3a. Mentors work with new members to customize their Rotary experience (plan/roadmap for new member – use calendar)	Assimilation	Each July	
3b. Membership does evaluation of current members and use of “new member list” to ensure everyone on committee	Linda with Membership	Ongoing	
4a. Establish vocational sub-committee who assigns reclassification	Katie and TBD (work with Membership and Programming)	October	
5a. Keep dashboard of membership – if drop by 10% (125 to 113) then take action (exit surveys, retention stats)	Secretary	Ongoing	
6a. Recite 4-way test once a month and give certificate to member who demonstrates it	At-large Board member	Monthly and certificate periodically	

LEADERSHIP

VISION STATEMENT – WHERE WILL WE BE IN 3-5 YEARS?

The Club will have a robust board and committee structure that is clearly defined and produces a strong pipeline for executive leadership.

STRATEGIES

- Create a leadership development program
- Identify opportunities for members to serve in a leadership position

OBJECTIVES JULY 2013-JUNE 2014

1. **Leadership development program:** Create specific ways for club members to gain leadership development and have opportunities to serve and build leadership skills and experience with the goal of training future club leaders.
 - Be clear to board members that they should be willing to consider to serve as an officer or president at some point
2. **Governance Committee:** Establish a Governance Advisory Committee including roles of board engagement, monitoring strategic plan and committee tasks/jobs
3. **Leadership support:** Develop specific ways to take some of the workload off the President to make it a more manageable job
 - Flexibility/use of technology to support leadership
4. **To secure the club's number one service and fundraising project build leadership of Chili Cook-off through active committees:** Build the basic committees with Rotarians and community members

LEADERSHIP - YEAR ONE ACTIVITIES

ACTIVITY	COMMITTEE	TIMEFRAME	STATUS
1a. Establish Leadership Development Committee of past 3 presidents – a) Institutes; b) LCC; c) identify emerging leaders – survey committee chairs for input; d) discuss potential officer positions as recruit for board	Past 3 presidents	July	
1b. Educate club members by inviting speakers to provide nonprofit leadership speakers to club meeting	Program		
2a. Propose Governance Advisory Committee to board	John, Elizabeth and Bob R.	June	
4a. Create Chili Cookoff committees	Chili Chair	Ongoing	

APPENDIX

This section captures some of the detail of the vision discussion. This may be a useful resource for future planning as objectives continue to evolve.

SERVICE & FUNDRAISING VISION

The club remains focused on being a service organization and will maintain a healthy balance of providing service and raising funds for community organizations.

- The club maintains a balance of service opportunities and fundraising efforts.
- Members contribute generously to the service and fundraising efforts as they can include Time, Talent and Treasure.
- Members feel there is ample opportunity to give, but no one leaves the club because they feel overwhelmed by the expectation for service or monetary donations. (Anyone who is not truly interested in some level of service will not become a member due to strong vetting/education process to become a member.)

MEMBERSHIP, FELLOWSHIP AND ENGAGEMENT VISION

The Club is made up of members who embrace the 4-way test and the values of service and fellowship. Our club has over 100 diverse members who are engaged, passionate and community minded.

- The club continues to add members to remain a healthy and sustainable size (consider current size healthy and sustainable).
- The members that join are of a high quality meaning that they understand and embrace the 4-way test and the values of service and fellowship that are important to our club.
- Our club continues to increase in diversity of members including age, ethnicity, and profession.
- The majority of our members are very engaged: attending weekly meetings, serving on committees, attending fellowship events, participating in service events, supporting fundraisers

LEADERSHIP VISION

The Club will have a robust board and committee structure that is clearly defined and produces a strong pipeline for executive leadership.

- The club continues to have a broad base of talented members serve in leadership positions.
- There is strong support for the President position so that the role is clear and manageable.
- Our officers, board and committee chairs use collaborative leadership behaviors.
- Our committees continue to stay strong, leading activities so that the board can focus on governance and strategy.