

Rogers Rotary Club

Strategic Plan 2010-2011



How to Use This Document

We intend this plan to help all members of the Rogers Rotary Club serve the mission, achieve the vision, and live the values.. If you just want to know what happened, read the overview and the action plan summary on page 4. If you want to know what actions the process lead the board to plan for the club this year, read the whole action plan (page 4-7). For other good ideas that could help everyone contribute, check out Appendix C.

Overview

In May and June of 2010 the Rogers Rotary Club executed a strategic planning process to identify both the essential elements for club success and strategies for achieving that success. This document, the result of the process, is intended to provide future boards guidance and a basis for maintaining a consistent long-term effort to improve the club. The plan establishes both a standard against which to measure success and prioritized plan for execution. Each new board is expected to modify the plan to meet future conditions and priorities.

The entire club was invited to participate by email in each preliminary element of the process, and participation included a diversity of members—long term members, new members, men and women, committee chairs and directors, low participation members and former club presidents. A few members contributed to each element of the process, but more contributed to one or two elements of particular interest to them. The facilitator integrated club members' input into this document, which was then refined, made actionable, and approved by the incoming club board of directors during a strategic planning session held on June 15 (for attendees and agenda, see Appendix D).

For a quick view of the actions planned to execute the strategic plan, please see the Action Plan Summary on page 4.

The action plan resulting from that meeting begins on page 4. The compiled and coordinated input from club members can be found in the following appendices:

- ◆ Stakeholders and Expectations (A)
- ◆ SWOT Analysis (B)
- ◆ Issue Identification and Strategies (C).

The process was adapted from one detailed in John M. Bryson's *Strategic Planning for Public and Nonprofit Organizations: A Guide to Strengthening and Sustaining Organizational Achievement* (Jossey-Bass: San Francisco, 1995).

Mission Statement

The Rotary Club of Rogers exists

- ◆ *to serve* the people of Rogers and Northwest Arkansas by meeting their needs with contributions of time, effort, and money,
- ◆ *to promote* members' awareness of peoples' needs to be served, *to provide* a structure through which members can serve those needs, *to present* members a weekly occasion for fellowship, service, and fun,
- ◆ *to provide* a forum for exchange of ideas among community leaders, and
- ◆ *to support* the values, goals, vision, and mission of Rotary International and Rotary District 6110.

Vision Statement

Our vision is that as soon as possible but no later than July 2013, the Rotary Club of Rogers will

- ◆ be recognized in the local nonprofit community as the premier civic organization in the city,
- ◆ be filled with dynamic, diverse, energized, enthusiastic members who are committed to meeting people's needs through Rotary service,
- ◆ have grown in net membership, meeting attendance, and project participation each year, and
- ◆ have developed an *esprit de corps* based on a commitment to common goals, a

network of interpersonal relationships within the club, a sense of loyalty to the club and to R.I., and a sense of competence in meeting people's needs.

Core Values

Our core values incorporate the following core values of Rotary International:

- Service** We believe that our service activities and programs bring about greater world understanding and peace. Service is a major element of our mission. Through the plans and actions of individual clubs, we create a culture of service throughout our organization that provides unparalleled satisfaction for those who serve.
- Fellowship** We believe that individual efforts focus on individual needs, but combined efforts serve humanity. The power of combined efforts knows no limitation, multiplies resources, and broadens our lives and perspectives. Fellowship leads to tolerance and transcends racial, national, and other boundaries.
- Diversity** We believe Rotary unifies all people internationally behind the ideal of service. We encourage diversity of vocations within our membership and in our activities and service work. A club that reflects its business and professional community is a club with a key to its future.
- Integrity** We are committed to and expect accountability from our leaders and fellow members, both in the results of our efforts and in the processes we use to accomplish our goals. We adhere to high ethical and professional standards in our work and personal relationships. We are fair and respectful in our interactions, and we conscientiously steward the resources entrusted to us.
- Leadership** We are a global fellowship of individuals who are leaders in their fields of endeavor. We believe in the importance of leadership development and in leadership as a quality of our members. As Rotarians, we are leaders in implementing our core values.

Action Plan

The following plan was adopted at the meeting.

Summary The action plan is a detailed set of initiatives to be taken to execute our club’s mission and achieve our vision in accordance with our values and the presidential intent. Within their understanding of this guidance, members, committee chairs, and directors have the freedom to dream, create, and serve. The president’s guidance is to stress transparency and accountability in all we do. Our actions and ends must be transparent to our fellow members and accountable to the strategic plan. Two first steps are essential to the success the plan—installing the R.I. Leadership Plan and establishing missions and functions for all committees. The board set its priority for action on three inter-dependent issues—committee work, building enthusiasm, involvement, and relationships, and improving retention.

Presidential Intent “For this Rotary year, I hope to build on the excellent leadership Rotary has had in the past, particularly the immediate past presidents—Wendy Kumpe and Rick McLeod. Progress for a part-time, volunteer organization like Rotary depends to a large part on informed, empowered members being served by leaders who provide structure and support to help members spend their energies in effective Rotary service.

“So, board members are empowered to act in their areas of responsibility to carry out the strategic plan, to create and eliminate committees, to change methods and functions of committees, and to explore new areas of service. And I encourage board members to similarly empower committee chairs. Further, individual members who have ideas for projects or fund-raisers can research their idea, identify team members, and then seek start-up funding from the board.

“Our actions and ends must be transparent to our fellow members and accountable to the strategic plan. I hope to set the example by posting board meeting minutes, this plan, committee functions, and other items of interest on the website, devoting a meeting quarterly to club building, creating an internal review committee, and exploiting other opportunities to increase transparency, accountability, and communication throughout the club.” – Buddy Rogers

Essential First Steps The board agreed that two steps are essential for any strategic plan to succeed: (1) the *Rotary International Leadership Plan* must be fully implemented to provide continuity of leadership in the club, as well as to promote involvement of more members in leadership roles and activities, and (2) all *committees* must have

clearly defined missions, activities, and minimal expectations of meetings during the year.

RI Leadership Plan

The Rotary International Leadership Plan will be implemented by board members beginning immediately to be completed no later than December 31, 2010. Each board member will recruit a Director-Elect and a Director-Designee to assume the directorships during the next two years. The exact method of recruitment is left to the director's discretion. The Club Secretary and Club Treasurer have held their positions for many years and are invaluable in them. Nonetheless, the board requests that those officers recruit deputies who will assist them in their duties and be prepared to take over the primary roles when the incumbents desire. Each board member will also recruit or have chairs of their committees recruit deputy chairs and chairs-designee. When fully implemented, the RI Leadership Plan will approximately triple the number of members fulfilling leadership roles and will enable greater continuity and progress.

Committee Mission & Functions

The directors are also asked to produce or have their *committees* produce brief (one paragraph or so) mission and functions statements. These statements will be communicated to the club during the annual club assembly meeting, July 6. It is expected that experience and needs will necessitate changes in these statements during the year, but the statements will provide an essential starting place.

As these statements are produced, the directors may also create or eliminate committees as they see fit, as long as they inform the board of their actions. If a board member raises an objection to the director's proposed action or wants to suggest a modification of it, the board as a whole will consider it at the earliest opportunity.

Action Priorities

The board has determined that three member-identified issues are the priority for action during Rotary Year 2010-11. The board found that the three issues are so tightly interrelated that progress with any requires action on all: Committee Work, Enthusiasm/Involvement/Relationship Building (EIR Building), and Retention. The issues of Programs and Cost of Membership will not be ignored, but they will receive board attention as the demands of the others allow.

Committee Work

The goal of committee work is to accomplish the service mission of Rotary by providing each individual Rotarian a structure, opportunity, and context for his or her involvement in the club. Committees that do not meet, have no clearly defined purpose, depend on the labors of only a few members, or do not perceive their impact on the club are dysfunctional and are an impediment to retention and to enthusiasm, involvement, relationship building. In addition to the

essential first step of identifying each committee's mission and function, the following actions will be pursued:

- ◆ have each committee report to the club annually during a meeting about their work and plans (scheduled every other week throughout the year).
- ◆ empower committees to modify the mission and functions with Director approval throughout the year
- ◆ place an organization chart/flow chart of committees on the website
- ◆ have Directors meet with committee chairs twice a year
- ◆ empower committees to take the initiative in their areas of responsibility
- ◆ empower committee chairs to establish and recruit for subcommittees as they see fit
- ◆ have the Rotary Information Committee discuss committee work with prospective members and giving each new member a listing of committees and their missions and functions
- ◆ have the president assemble a consulting group of past presidents in which each past president will be a mentor to a committee chair

The goal of these initiatives is to ensure that committees become more functional by empowering them to perform service that is meaningful to their members and for them to keep their Directors informed about their issues and activities rather than waiting for Director approval.

EIR Building Many members identified a desire to improve the relationships among Rotarians, our enthusiasm for attending meetings and participating in projects, and our involvement in all phases of the Rotary mission. The two essential first steps promise to increase involvement by tripling the number of Rotarians who have or know they will soon have leadership positions and to improve enthusiasm by making committee service more meaningful. Also, many of the committee work initiatives will also aid in EIR Building.

In addition the following actions will be pursued:

- ◆ devote part of at least one program per month to informing and educating members about our club, RI, and each other (for example, continuing the practice of having two Rotarians give a 10

minute autobiography)

- ◆ to encourage members meeting new people, ask the club vote to have one meeting per month with assigned tables
- ◆ continue and revitalize the new member orientation program (red badge)
- ◆ task the Social Committee to propose two or three social events in addition to the Christmas party
- ◆ ensure that social fun is part of every meeting

The goal of these actions is to create a fun and personal environment in Rotary in which every member knows and cares personally about every other member.

Retention

Although our club continues to add new members at a healthy rate, we also lose members at about the same rate. Of course, some members quit because of relocation or changed personal or professional circumstances. These losses are unavoidable. Some newer members realize that Rotary is not how they want to spend their time. Some of these losses will always persist because no club can recruit perfectly. However, members and the board also believe that some avoidable losses occur because members become lost in the club or never find a rewarding avenue of service. It is these losses that we address with the measures listed above and these specific retention initiatives listed below:

- ◆ create a Study Committee to interview members who have recently quit to find out the reasons and report it to the board
- ◆ create and task a Mentorship Subcommittee of the Membership Committee to mentor new members individually
- ◆ through communications from the secretary, the member's mentor, and possibly his or her proposer let members who miss meeting know that they are missed and offer help

APPENDIX A

Stakeholders and Expectations

The board and members have identified the following stakeholders in our club’s success and what those stakeholders’ expectations are for the club. This is an edited draft; it includes all suggestions, with only obvious duplications deleted. Since virtually every response included a “beneficiary of the club,” I have provided both the expectations identified for a generic beneficiary and those that are specific to specific beneficiaries cited in the responses.

<u>Stakeholders</u>	<u>Expectations</u>
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Beneficiaries of the club	Continued support or start up funds. Leadership by example. To be the leader among civic groups. To conduct service projects(or dues collections) to raise sufficient funds to support community projects, including scholarships. To be a venue to publicize their missions and needs to Rotarians to garner Rotary and business support outside of Rotary.
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City of Rogers	Christmas Parade line-up and traffic control assistance.
Community organizations	Assistance to their organization, financial, volunteer work, awareness.
Adult Development Center	Funding for the walking trail at the new facility. Continuing annual financial support.
The Ozark Natural Science Center	Originally just cup money, now an annual budgeted contribution.
Students and Schools	Opportunities to earn college scholarships (high school seniors and, indirectly, Single Parent Scholarship Fund). Opportunities to participate in character building activities (RYLA, 4-Way Test Speech Contest). Opportunities to present NWACC oriented programs and receive support (Chorale). Dictionaries for third graders and subsidies for attendance at Ozark Natural Sciences Center programs (see above).
Project Lifesaver	Rogers Noon Rotary helped begin this program in Benton County. An opportunity to request future support.
Local Food Banks	Financial support (currently from cups).

Community of Rogers	Assistance in identifying and working towards community goals to make our community stronger and provide the building blocks for a better life for our citizens.
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Members

Relevance: not a waste of their time to attend a meeting or participate in an event. A clearly communicated and well understood purpose. Communication about the difference the club and individual members make and about the club's impact on the community. Encouragement for meaningful participation by all members. New, interesting, and informative programs. At least one personal "ask" per member per year to work for the club. Fellowship. Intriguing community service opportunities. The club to maintain a good relationship with elected officials, citizens, and other Rotary organizations. Fun weekly meetings in a comfortable place with good food. Networking, fellowship, education, service to community.

Embassy Suites

Income from our meetings; exposure to visitors in the community who might not be familiar with the venue.

Rotary International

Our club to meet minimal standards of financial support per member (district/international dues, RI Foundation support). Support some of RI's designated projects (PolioPlus, Wheelchair). Adherence to RI rules and regulations for club activities. Proper use of all Rotary related trademarks, symbols, and terms properly.

APPENDIX B

SWOT Analysis

The Rotary Board and Members identified the following internal strengths and weaknesses and external opportunities and threats.

Strengths:

Strong leaders.

Excellent, varied programs.

Good fellowship among members.

New members orientation/integration program is effective.

Membership is a unique group of opinion leaders and influencers with widely varied circles of contacts.

Membership is a rich pool of executive, volunteer, vocational, and life experience.

Deep Rotary leadership experience among members.

Weaknesses:

Lack of ethnic and occupational diversity proportional to the community businesses & population (very few minority members and disproportionately financial businesses).

Connectedness to Rotary International sometimes hard to fully embrace beyond pure dollar support.

We do not leverage our member-community leaders enough to tell the Rotary story locally. We don't "toot our horn" enough in subtle ways. We have a lot of big name people attend and speak to our Club. They share insights that others don't get exposure to. I don't believe the local community knows the quality of our programming, and for prospective members, this would be a key attraction. They would want to be a part of it, if they knew more of what we do. We need to

announce 2-3 weeks in advance and encourage members to bring guests.

Too few members bring guests (not necessarily as a prelude to membership).

Too little variation in table partners, so not enough interchange among different groups of Rotarians.

Rotary leadership experience is not tapped in a systematic way as consultants/mentors.

Annual scramble for committee chairs and board members (Rotary leadership plan not fully implemented).

If Hal and Clarence are out of commission, we're out of luck.

We lose old members while attracting new members.

Many committees have minimal participation and have poorly defined purpose.

Members rarely take the initiative to create and execute new projects.

Opportunities

Continual influx in our community of vendor staff, business people from different backgrounds than our primarily locally based membership—opportunities for members and/or for programs.

Presence of major corporations such as Wal-Mart, J.B. Hunt, and Tysons—as above.

Locally oriented print media outlets are always looking for a good story: Morning News, Celebrate, etc.

New media and associated tactics: social, such as Facebook, Twitter, Flickr, LinkIn; search engine optimization, blogs, etc. All are opportunities to tell our story, entice potential new members, etc.

Occasions for celebration or fests that are not yet used by other groups in the community; e.g., Derby Day (Kentucky Derby).

A lot of life, business, community knowledge & experience to share with others, especially with youth We should actively promote Rotary to build awareness in the local community, perhaps issue more press releases when we do something that helps others and send along with it photos

to the local media (online and offline). Maybe even purchase a few ads every year that are self promotional and promote the Rotary “brand” and programs.

Threats

Rotary sometimes is perceived as an “old” organization.

Dues are high for some potential new members, particularly in current economic climate.

Attendance requirements for some classifications may preclude potential members.

Lack of community awareness of our clubs contributions to the community.

APPENDIX C

Issue Identification and Strategies

Club members identified the following issues as items that can affect the club's success. The specifics of issues are grouped in general areas of concern.

Committee work

Issues

- ◆ No clear vision or expectation of the current committees.
- ◆ Lack of direction, awareness of what the committees are and what their functions are.
- ◆ Lack of committee meetings.
- ◆ Committees don't do anything.
- ◆ Uncommitted membership leading unsuccessful committees.

Strategies

- ◆ Set expectations annually by writing down each committee's functions and expectation the board has for each. Expectations should include the following: task(s), meetings, leadership development, 5 minute recruiting talk to the Club each Spring of functions, goals, and accomplishments.
- ◆ Evaluate if there are too many committees or not correctly structured to function. Have each committee evaluate its value to its members and to the club. Eliminate committees as needed. Eliminate the following committees: World Community Service, Grant Applications, both Foundation committees and have the Director, Foundation do both and form ad hoc committees.
- ◆ Make one regular Rotary meeting per quarter to be a business meeting of all committees to review their goals.
- ◆ Install Rotary Leadership Plan at committee level to ensure fresh blood and leadership opportunities for all: a three-year progression of chair, co-chair, and chair-designee. Accept the fact that 10% of any group does 90% of the work, and that Rotary is no exception.
- ◆ Encourage (demand?) that proposers discuss committee work with the prospective member, especially their committee. Circulate proposed member information to committee chairs so they can recruit the new member for their committee. Make a

discussion of committees and the proposed new members' committee preference part of the orientation program.

Membership Costs

Issues

- ◆ Costs of Rotary: \$677/year, \$12.95 a week.
- ◆ Attendance requirements: lenient or too strict on attendance requirements? Evenly applied?
- ◆ How much do the members *really* want to give to Rotary in time, talents & fiscally outside of weekly meeting and basic dues?

Strategies

- ◆ Structure costs differently for those paying personally, rather than corporately—an individual membership and a business membership.
- ◆ Take tetrazzini dinner tickets out of the annual cost of membership, or emphasize to members that they should keep for themselves any funds generated from tickets sold unless they *want* to donate the amount.
- ◆ Recruit new members by providing clear “cost” of membership.
- ◆ Survey members using sound survey construction principles to understand what value members feel they receive from Rotary membership. Find out what would better justify the financial cost to the membership.

Enthusiasm/Involvement/Relationship Building

Issues

- ◆ Comfort with status-quo? Is this why limited outreach to community in new service areas, uninvolved members for internal club service projects, unconnectedness to International, not mixing it up in tables.
- ◆ Rotarians involved in various service projects/committees because it is the right thing to do or because “assigned”, but passion/excitement/enthusiasm regarding specific assigned committee/task marginal.
- ◆ Why are we Rotarians? What do we expect from Rotary?
- ◆ Duty vs passion. Commitment?
- ◆ Uncommitted membership leading unsuccessful committees

- ◆ Lack of consistent involvement by members. Although most people work the major fund-raisers, other projects engage few Rotarians and committee work is virtually non-existent with a couple of exceptions.
- ◆ Annual scramble for committee chairs: directors either have difficulty finding committee chairs or the current person remains in that position for years.
- ◆ How to encourage more mixing instead of sitting at same table all the time.
- ◆ Social events for Rotarians; social events with purpose (XYZ committee meetings).
- ◆ Lack of relationship building amongst members; new members need to build a relationship other than their sponsor to help retention

Strategies

- ◆ Provide incentives for sitting at new tables and meeting new people. Make one Tuesday a month a mandatory new table month, every member must have people he or she doesn't know well on each side.
- ◆ Ask the members what they expect from Rotary, whether they'd attend social functions, etc. Find out if they are as involved as they want to be?
- ◆ Understand whether members expect to be involved in Rotary on "company time" or on "personal time."
- ◆ Have more social events to give opportunities for each of us to meet new people and create bonds that further our work in Rotary.
- ◆ Increase the levity, spontaneity, and fun in meetings. Sing non-Rotary songs occasionally. Take the microphone into the crowd for "Phil Donohue" type interviews of members about their lives or their Rotary story.
- ◆ Encourage members to be "entrepreneurial" about championing projects: promise a start-up stake of up to \$500 for members who will begin an appropriate project (with board approval). The champion, recruits members and leads the planning and sells the project to the club for full support.
- ◆ Chairs should plan and publicize projects and work needs farther in advance to encourage availability of workers.
- ◆ Implement Rotary Leadership plan for Directors and Committee Chairs as well as for the presidency.

Programs

Issues

- ◆ Programming for a wide age ranging crowd as the group gets younger.

- ◆ Non-profit programs that are merely a pitch for funds or a discussion of the organization and/or history of the organization. The best non-profit programs tell stories (especially about how the org. affects Rogers area) or provide new information on issues the non-profit deals with.

Strategies

- ◆ Program for a wide age ranging crowd as the group gets younger.
- ◆ Non-profit programs that are merely a pitch for funds or a discussion of the organization and/or history of the organization. The best non-profit programs tell stories (especially about how the org. affects Rogers area) or provide new information on issues the non-profit deals with.
- ◆ Involve members more often in programs.
- ◆ Publicize that any member can bring a program by working through the program committee.
- ◆ Seek out “cutting edge” presenters—new businesses, new UofA initiatives, etc.

Retention**Issues**

- ◆ Too many new members quit within a few years.
- ◆ How is a new member plugged into an existing committee and/or projects?

Strategies

- ◆ Encourage more members to accept leadership positions. Identify new members from the beginning as leaders.
- ◆ Have each new member identify two committees that he or she will investigate for a commitment to lead.
- ◆ Make the path to club leadership transparent—productive committee member, committee co-chair, chair, director, president. Reward those who go to District events with preferential consideration for leadership positions.
- ◆ See above—committee work, involvement, relationship building, programs all affect retention.

APPENDIX D

Agenda for Strategic Planning Meeting

Time	Activity	Product
4:00	Overview: purpose, process, products	agreement on session
4:05	Review, revise, approve mission statement	mission statement
4:13	Review, revise, approve vision statement	vision statement
4:20	Consider values to add, approve values	values
4:25	Set priorities of issues to address, set work teams	3 issues with teams
4:30	Create action plan (actions, priorities, owner)	Oral report of same
4:50	Break	
5:00	Report Issue #1	Amended and approved action plan
5:15	Report Issue #2	Amended and approved action plan
5:30	Report Issue #3	Amended and approved action plan
5:45	Clarify and integrate plan, identify committees to accomplish plan, set follow-up,	Integrated plan

Attendees

Attending were immediate Past-President Rick McLeod, representative of President Wendy Kumpe; Buddy Rogers, President-elect and facilitator; Greg Stanfill, President-Designee; Hal Savage, Secretary; Stuart Epley, Sergeant-at-Arms (incoming), Susan Jasan, (incoming) Director for Administration; Linda Phillips, Director for Projects; Joe Spivey, Director for Membership; Jonathan Wilson, Director for Public Relations; and DeAnne Witherspoon, Director for Rotary Foundation.