

# Rotary Club Naperville Downtown (RCND) 3 Year Strategic Plan

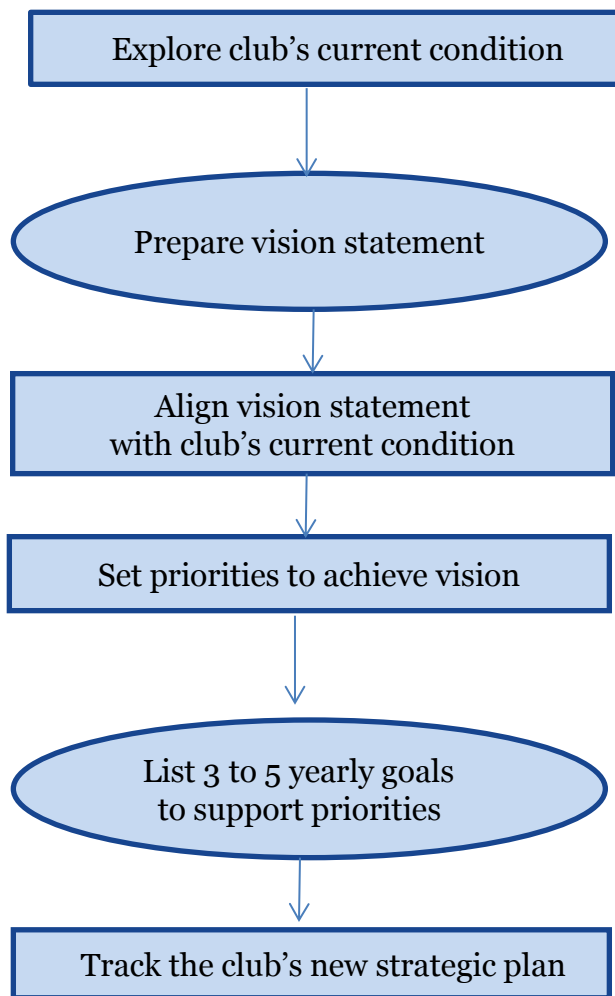
# 2016 STRATEGIC PLANNING PROCESS

1. Planning process occurred over 3-4 months (Sept-Dec 2016) during club assemblies \*
2. Meeting based on Rotary's model for strategic planning
3. Part 1: September 2016 Meeting Objectives and Outcomes
  - ✓ Understood planning process and where we are today (2016 survey results)
  - ✓ Reviewed current Mission and Vision Statements and agreed to solicit ideas by Oct
  - ✓ Initial brainstorming of where we want to be over the next 3 years
4. Part 2: October 2016 Meeting Objectives and Outcomes
  - ✓ Reviewed mission and vision statements submissions and agreed on one for club
  - ✓ Continued collaboration of ideas where we want to be and how we get there
  - ✓ Ideas were then captured in 3 key priorities and actions drafted (post meeting)
5. Part 3: December 2016 Meeting Objectives and Outcomes
  - ✓ Reviewed and finalized RCND Mission and Vision statements
  - ✓ Reviewed and finalized RCND 3 Year Strategic Plan (3 Key Priorities, Goals, Actions)

\* 3 year strategic planning process facilitated by Club President (FY2016-17) Naish Shah

# STRATEGIC PLANNING – PLANNING MODEL FROM ROTARY INTERNATIONAL

**The Strategic Planning Model**  
Create a vision for your club, with strategic priorities that will help you achieve it. Then set yearly goals that support each strategic priority.



# WHERE ARE WE NOW ? (SUMMARY OF 2016 SURVEY)

## Club strengths

- Great members and Comradery
- Nice Venue (location/time/food)
- Our programs and speakers are very good
- Rotary Ride event
- “No Hassle Dues” and 100% Paul Harris TRF

## Club weaknesses

- Attendance
- Lack coordinated effort in driving Membership
- Consistency in listening, politeness paying attention to our speakers and/or guests
- More club member engagement in grant process
- Need structure in planning (budget & programs)

## Opportunities

- Member retention and additions
- Increased attendance by members
- More member engagement in grant process
- Continuing our focus on serving the community
- Update club’s strategic plan

## Challenges

- Limited TIME
- Hard to grow membership
- Commitments to other organizations

# ROTARY CLUB NAPERVILLE- DOWNTOWN

## REVISED MISSION STATEMENT

*We are dedicated, in the Rotary spirit of Service Above Self, to making a difference by addressing unmet needs in our community and contributing to support The Rotary Foundation.*

## REVISED VISION STATEMENT

*The Rotary Club of Naperville Downtown will:*

- 1) Offer flexible and innovative ways for our members to participate in Rotary*
- 2) Continue to make a difference in our community by supporting local projects and charitable organizations*
- 3) Be a great experience every week for each member and guests*
- 4) Generously support The Rotary Foundation and its programs around the world through annual giving*
- 5) Collaborate and build fellowship with other Rotary Clubs*

# WHERE DO WE WANT TO BE ? (NOTES FROM MEMBERS IDEAS BELOW)

List characteristics that you would like our club to have 3 years from now:

1. Sustaining flexibility
2. Minimum of 15-20 in attendance at each meeting
3. Encourage members to invite More Guests
4. Consistent attendance/more faithful/part of weekly routine
5. **Really** great programs 5-6 times/year with guests and good attendance
  - a. Monthly “should make” meeting
  - b. Who will coordinate this to make it happen?
  - c. Use a Calling tree structure for members to contact fellow members whose attendance has fallen off
  - d. **Really** advance notification of the 5-6 special programs so members save the dates
6. Strive for all Grants leveraged 3 to 1
7. Maintain the personality of the current collective membership
8. Continue to be a leader in giving to Rotary Foundation per capita
9. Leverage speakers from District or other Rotary Clubs
10. Members who cannot attend should arrange for substitutes to attend in their place(s)
11. Invite, invite, invite club members thinking about inviting guests !
12. Raise awareness of International service Rotary by having a 5 minute video every week

# HOW DO WE GET THERE ?

- A. 3 Key Priorities and goals were set that will help our club achieve its vision:**
  - 1. Increase Attendance ensuring members receive full value of their dues**
  - 2. Increase member engagement in identifying grant opportunities**
  - 3. Increase member retention/acquisition and maintain program quality**
  
- B. Listed tasks and activities, timeline, resources, and people necessary to meet these goals**
  
- C. Will track and review strategic plan (including vision statement) each year with club members and revised as needed.**

# STRATEGIC PRIORITY # 1

## Strategic priority 1: Increase Attendance ensuring members receive full value of their dues

Annual Goals	Tasks/Activities	Timeline	Resources Needed	Member Assigned
<b>GOAL:</b> At least half of club members represented at every RCND Club Meeting.	Every Rotary club member is requested to notify the club President and "Attendance Advocate" if he or she will miss a meeting.	Effective January 11, 2017	Electronic mail to Club President and Attendance Advocate	Gary Baumgartner as Attendance Advocate for remainder of FY2017 and current Club President Naish Shah.
	Schedule SIX "should attend" special Club Assembly meetings for the calendar year 2017. Provide advance notice at least 60 days. Ensure excellent programs these 6 meetings.	Effective February 8, 2017	E-mail	RCND Board members
	Every Rotary club member is encouraged to send a substitute when they miss a meeting (friend, co-worker, family, Rotarian from other club) and notify club officer.	Effective January 11, 2017	E-mail	Every club member  Monitored by Club President and one other officer (TBD)
	Assign each member of RCND a fellow member to contact if a member has missed more than three meetings in a row.	Effective January 11, 2017	E-mail, MS Excel	Membership Chair, Club President with optional Board Review.



# STRATEGIC PRIORITY # 2

## Strategic priority 2: Increase member engagement in identifying grant opportunities

Annual Goals	Tasks/Activities	Timeline	Resources Needed	Member Assigned
<b>GOAL</b> All members engaged in grant identification and grant leverage opportunities (matching funds...)	Every Rotary Club member encouraged to submit a minimum of one grant request a year.	Effective January 11, 2017	Grant form and	Every club member  Monitored by Board
	Discuss grant ideas for 5-10 minutes at each monthly club assembly.	Effective December 6 2016		Every club member
	Continue to encourage local service organizations to speak at club meetings (without direct request for grants)	Ongoing	E-mail	Every club member  Monitored by Program Chair
	Present grant process and how matching grants work (including District and/or RI matching) at least once a year	Effective March 2017		Community Service Chair
	Continue grant process with periodic updates (at least twice a year).	Effective January 11, 2017	E-mail, MS Excel	Community Service Chair  Monitored by Board

# STRATEGIC PRIORITY # 3

## Strategic priority 3: Increase member retention/acquisition and maintain program quality

Annual Goals	Tasks/Activities	Timeline	Resources Needed	Member Assigned
<b>GOALS:</b> Increase membership by 5%-10% per year while maintaining quality of programs	Every member encouraged to bring guest(s) and prospective member(s) at least 4 times a year. Focus on younger members.	March 8, 2017	None	Every club member  Monitored by Membership chair
	Every member to look at club website to find open dates for speakers and give suggestions to Program Chair.	Ongoing	Club website	Every club member
	Raise awareness of International service Rotary by having a 5 minute video every week.	November 2017	Rotary.org website	Naish Shah and Club Service Chair
	Inform new and prospective members about Rotary member benefit program (Rotary Global Rewards)	Ongoing	None	Naish Shah
	Maintain flexibility with our members (family or joint membership, sensitivity to personal situations, etc.)	Ongoing	None	Board members
	Members to encourage each speaker to bring up to 5 guests who are interested in learning about Rotary.	January 11, 2017	Email	Monitored By Program Chair

# ONGOING FOLLOW UP ON RCND STRATEGIC PLAN (2016-2019)

- ✓ Goals for current year (FY2016-17) supporting 3 strategic priorities were identified
- ✓ Goals set in Rotary Club Central for tracking progress in FY2016-17 by Club President Shah
- On an ongoing basis future Board of RCND will track and review strategic plan (including vision statement) each of the next 3 years with club members and revise as needed.

THANK YOU FOR YOUR MEMBERSHIP IN RCND !!