

METRO ROTARY COLUMBIA, MO

3 YEAR STRATEGIC PLAN

Years 2016-2017, 2017-2018, 2018-2019

This three year plan, which will be reviewed and updated annually, is intended to guide our club as it grows and help it be a transformative influence in our community and a vibrant, contributing component of both District 6080 and the worldwide Rotary organization. This plan builds on the work done in conjunction with the 2010-2013 and 2013-2016 plans, and both updates and confirms and continues that direction as described in Part 1 of this Plan. The strategic plans were developed with the active participation of the club officers, board and committee chairs and also reflected input from our members. This plan was adopted by the board on 12/9/2015 and presented to the full club membership on 7/6/16. Annual updates and detailed action steps will be adopted each year following receipt and review of the Presidential Citation challenge from RI.

The plan is organized as follows:

- Part 1: A look at our current and future state.
- Part 2: Three year goals
- Part 3: Current Year Action Steps and Responsibilities (to be added annually through the accountability tracker – July 31)

In order to ensure consistency in approach and a sustainable foundation for attracting and involving members, this plan is intended to be regularly consulted by officers and the board and to guide their decision-making on individual issues.

PART 1. CURRENT AND FUTURE STATE

Current State:

- We are a fun, energetic and committed group committed to both informal interaction and to the administrative structures needed to sustain and grow both membership and programs.
- We have strengths in the diversity and relationships of our members: youth and energy; long tenure with knowledge of club and Rotary; a range of backgrounds; and many with strong connections to a wide variety of community groups and other organizations.
- Our weakness is primarily the risk in an all volunteer organization of ensuring a sustainable structure, institutional memory, and focus as we move through leadership and membership changes.

Future State:

- *We will be a transformative influence in our community, known for what we have given, and will continue to be a fun, energetic, enthusiastic club, deeply committed to “service above self”.*

2016 – 2019 Goals:

- We will maintain a strong, stable membership with sufficient growth to sustain our current numbers.
- Our meetings and other activities will evidence strong fellowship.
- We will remain in the top tier of clubs in our District in our support of Rotary International as demonstrated by meeting Foundation giving goals, earning the Presidential Citation, and deep individual and organizational internalization of the 4 way test..
- We will work to raise the awareness of Rotary in the broader Boone County region.
- Our leadership transitions will be smooth and timely.
- We will continue to work to strengthen our committees and sustain a collaborative culture that involves all members.
- Both the Community Service and International Service projects that we invest in will be innovative, sustainable, and make a demonstrable difference in the lives of others.

PART 2. GOALS AND OBJECTIVES

Goal: We will maintain a strong, stable membership with sufficient growth to sustain our current numbers.

- +In each year we retain 85% or more of members in order to sustain our Club.
- + We will seek to recruit members from Rotaract, and continue to co-sponsor and mentor members of Rotaract.
- +We will also continue to seek and welcome members from all generations to be among the ranks of our Club in order to maintain the intergenerational vibrancy of our membership.
- +When we recruit new members we will fully disclose the required commitments (time and \$\$) in order to ensure sustainable recruiting.
- +We will continue to use a new member “packet” and orientation process that promotes a new member’s active involvement and will match new members to committees within three months of their joining. A copy of this strategic plan will be included in the orientation packet.
- +We will use member networking and outreach to grow our membership.

Goal: Our meetings and other activities will evidence strong fellowship.

- +We will strive to have at least 50% of members with attendance of 70% or greater.
- +We will continue our tradition of quality programming, and also solicit member feedback on programming at the end of each year.
- +In addition to regular club meetings, we will annually host at least 7 Fellowship Activities that at least 40% of Club members attend, one of which will be a family event.
- +The Vocational Service Committee will work with the Programs and Fellowship Committees to use vocational designations and awareness for networking and building relationships in the club.
- +We will plan for and hold a Charter Night celebration in June of each year.

Goal: We will remain in the top tier of clubs in our District in our support of Rotary International as demonstrated by meeting Foundation giving goals, earning the Presidential Citation, and deep individual and organizational internalization of the 4 way test.

- +We will continue to work to support and promote awareness of the work of Rotary International by working with other clubs to host and sponsor GSE teams and Youth Exchange students as opportunities arise, and to fund international service projects.
- +We will annually meet the goal of 100% of active members supporting the Foundation, and a \$20 contribution will continue to be collected from each member along with club dues.
- + During the term of this three year plan we will increase the number of club members who support the Foundation through Rotary Direct to at least 28 members.
- +By the end of the 2015-2016 year we will have increased the percentage of club members who are sustaining members (at least \$100 per year) to 55% of active members.
- +We will seek annually to increase the number of Paul Harris Fellows in the club by at least 3.
- +We will annually present at least two club programs or presentations during the year to educate our members about the Foundation, encourage donations, and celebrate Paul Harris Fellows.
- +In each year we will continue to have at least one program focused Vocational Service as an important component of Rotary, and also make our club's Vocational Service award annually.

Goal: We will work to raise the awareness of our club and of Rotary in the broader Boone County region.

- +We will maintain our weekly newsletter and complete website upgrades annually.
- +We will consciously use our publicity and advertisements to connect to potential new members, and will issue at least 6 press releases and have 4 articles featuring Metro Rotary programs or activities on an annual basis.
- +We will collaborate with other Rotary clubs on community wide messaging regarding Rotary and its mission.
- + We will work with other clubs to sponsor a celebration of "Rotary Day" each year that builds community awareness of the work that Rotary does.

Goal: Our leadership transitions will be smooth and timely.

+We will continue to use strategic planning to enhance the efficiency and efficacy of our Club and to grow and sustain our membership, using a three year cycle with annual action step planning and updates.

+The strategic plan will be actively used by the officers and board for both orientation and to guide decision-making.

+ During 2016-2018 the Administrative Committee and the Board will review the planning process and consider recommendations for strengthening that process.

+ We will continue underwriting PETS and SETS training.

+In each year we will pay to send the president and president-elect to the annual district conference.

+ We will develop and use a standard procedure for orienting new board members.

+We will hold an annual training on parliamentary procedure basics and chairing meetings for board members and all interested club members.

+ We will advertise District Leadership trainings to the Club, and plan to sponsor at least one member a year. We will also review other relevant RI leadership program materials. We will implement those elements that are consistent with our Club's collaborative and member-focused culture.

+ We will continue to provide all members with opportunities to pursue a leadership position within the Club, whether as an officer, committee chair, or project chair.

+We will elect our officers for the next Rotary year by December 31 of each year.

+We will continue to use and promote sound procedures for for fiscal management.

+We will consistently implement our board policies, including the policy on political communications, and our by-laws, and we will make sure that all committee chairs are informed on these.

Goal: We will continue to work to strengthen our committees and sustain a collaborative culture that involves all members.

+ In order to ensure strong committees through their annual transitions, we will identify the next year's committee chairs by the end of each Rotary year, hold at least three committee chair meetings per year, and continue to ensure that each member is matched with a committee.

+We will continue to recruit for our Administrative Committee to serve as a resource for the board and committees in coordinating the activities of the club and to serve in the role of “Club Trainer”. This committee will coordinate the club email address and Google Drive account to promote record retention, collaboration, and efficiency in the work of our committees, and help committees coordinate with the Board through the annual timelines and “Accountability Tracker.”

+ The Administrative Committee will provide DACDB and My Rotary orientation for committee chairs and any members who want it on an annual basis.

+We will continue to use multiple means during meetings to inform our members of announcements and other key information.

Goal: We will continue to invest in Community Service and International Service projects that are innovative, sustainable, and make a demonstrable difference in the lives of others.

+We will ensure that all District meetings needed to qualify our club to submit grant applications are attended by an appropriate officer or member.

+We will identify metrics and evaluation criteria in advance for specific programs or projects and weigh our efforts against those criteria at the close of each program or project.

+We will annually implement at least one community service project per year that is targeted to a significant, and documented community need, that is aligned with our goal to be a transformative influence on the community, and involves hands-on service.

+We will involve at least 30% of our members in that project in some way, and at least 80% of our members in at least one or more hands-on projects annually.

+ We will adopt a policy eliminating separate annual budget allocations for projects unassociated with and unreviewed by the associated committee (eg. Community Service, International Service, and make sure that the relevant committee reviews all uses of fund related to that Committee's charge for alignment with club goals and priorities, and makes recommendations to the board on how available funds are to be used.

+We will continue our PIE sponsorship of Title 1 and seek to have readers in every school through the duration of this plan.

+We will continue our focus on both nurturing youth and promoting education in our community.

+We will continue to raise the money needed to adequately fund our budget for Community Service, International Service and PIE programs, and to make a meaningful contribution to an annual fundraising partner recipient chosen by the board.

+ The board will annually review the amount of funds available to the club through the District Simplified Grant, and solicit from the committees proposals for the use of such funds.

+We will seek to collaborate with other clubs interested in projects that are aligned with our club goals in order to leverage the resources in Columbia to greater effect.

PART 3. ACTION STEPS AND RESPONSIBILITIES

This section consists of the Accountability Tracker which will be updated annually on or before JULY 31st of each year with specific projects and action steps, and will also incorporate the citation roadmap and identify responsible board members and committee chairs.

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