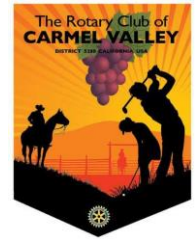




Rotary Club of Carmel Valley

Strategic Plan FY 2024-2026

January 1, 2025



THE INTENTION OF THIS STRATEGIC PLAN

1. To align with the Rotary International Seven Areas of Focus and focus on the need to integrate sustainability principles into everything Rotary Club of Carmel Valley undertakes.
2. Collaborate with Rotary District 5230 in our work.
3. Share Rotary International's commitment to build a world where people unite and take action to create lasting change. Rotary values individuality and celebrates the contributions of people of all backgrounds, regardless of their age, ethnicity, race, abilities, religion, socioeconomic status, culture, gender or sexual orientation.
4. Sharpen our focus on:
 - a. effective humanitarian service
 - b. the importance of fellowship among members as an essential element of sustaining membership and our capacity to serve.
6. Strengthen our membership base by adding new members each year, to enhance creativity and explore new approaches to service with new ideas.
7. Respond to evolving community values, needs and expectations.

OUR VALUES

Service above self:

Our activities are directed towards meeting community needs and improving the lives of community members.

Friendship: In working together to improve our community, bonds are developed with diverse people as together we are able to achieve more than we can as individuals.

Diversity: Diversity is inherent within our membership and greatly increases the effectiveness of how we work together to accomplish our service projects and other activities.

Ethics and integrity: We adhere to Rotary's Four Way Test:

- Is it the truth?
- Will it build goodwill and better friendships?
- Is it fair to all concerned?
- Will it be beneficial to all concerned?

Leadership: Rotary Club of Carmel Valley helps develop leaders who have vision and courage, who are able to lead by example, continually looking for better ways to achieve success and to take responsibility for outcomes. As leaders from

a variety of vocations, we can improve our ability to achieve our service goals within Rotary Club of Carmel Valley and the communities we serve.

OUR VISION

We subscribe to the Rotary International Vision:

Together we see a world where people unite and take action to create lasting change – across the globe, in our communities and in ourselves.

Rotary Club of Carmel Valley is active within the global Rotary movement. Our members, like all Rotarians, are **People of Action**. We participate in positive change in the world, and foster well-being and inclusion for our members, our communities and for humanity at large.

1. Our impact in the world: We respond to real-world issues, provide real-time community support during natural disasters, create systemic change by promoting greater human well-being and more cohesive, peaceful communities.

2. Our membership and our movement: Our membership embraces different locations, cultures, generations and vocations to attract leaders who apply their influence, know-how, wisdom and lived experience in humanitarian service.

3. Our organization, brand and values: We are adaptive and inclusive, upholding Rotary values in our decisions and actions, honoring our organizational heritage while continually evolving new approaches, and working with community leaders and other partners to increase our positive impact in our community and the world.

OUR MISSION

The Rotary Club of Carmel Valley is a unique fellowship of inspired business, professional, and civic leaders with significant community connections that foster the ideals of Service Above Self and high ethical standards. Our members are People of Action whose mission is to provide community, youth and international service to Monterey County and internationally to address real-world issues, create systemic change, support greater human well-being and more cohesive, peaceful communities.

KEY THEMES OF THIS STRATEGIC PLAN

Humanitarian Service Key Themes & Principles: The intent behind these project principles and themes is to facilitate the successful incubation and management of Rotary Club of Carmel Valley projects. Our humanitarian service projects will therefore be managed by adhering to the following principles by:

1. Aligning with one or more of the Seven Areas of Rotary Focus:

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

- Environmental sustainability

2. Meeting clearly defined, and unmet needs in the community, positively affirmed by those to whom the service is directed.

3. Defining a clear role for Rotary which actively involves Rotary Club of Carmel Valley members in project development and implementation, and as volunteer participants.

4. Having “Champions” who are club members, and are actively supported by Rotary Club of Carmel Valley Committees and/or project teams.

5. Leveraging, as appropriate, effort, financial and other support from community partners.

6. Having a clear implementation and project management plan that:

- a. Includes a budget and expected source of funding, fundraising initiatives, milestones and deadlines, and realistic expectations of support from the Rotary Club of Carmel Valley.
- b. Has clearly defined metrics that assess project performance and its beneficial impact on people and communities.
- c. Supports recipients of the service to build their self-reliance.
- d. Has a clear pathway to sustainability without ongoing Rotary support.

7. Demonstrating, by our actions, our members’ respect for our community and our club’s welcoming environment, regardless of gender, ethnicity or age.

8. Prioritizing and focusing our efforts:

a. Internationally: We will seek out projects, that we can either lead or support, that improve the lives of people in the developing world, or provide emergency aid in response to natural disasters.

b. Locally: Addressing areas of greatest need in Monterey County, California, particularly those experiencing socio economic disadvantage in the wake of major crises such as fires, floods and other natural disasters. We will seek out projects that address visible and preventable issues in communities in and around the greater Monterey County area.

9. Expanding the capacity and reach of Rotary humanitarian projects by engaging collaboratively with District 5230 and other Rotary Clubs.

10. By supporting Rotary’s strong commitment to creating a more environmentally sustainable world.

DEVELOPING OUR ORGANIZATION

We will actively engage with District 5230 and other Clubs in our area and identify inter-club collaboration opportunities in annual operating plans and budgets, and position the Rotary Club of Carmel Valley as:

- 1. An organization that thinks big and commits to bold initiatives; and
- 2. Demonstrates in its actions the ability to incubate projects that become significant contributors to people and communities in need; and

3. Welcomes leaders from a wide range of backgrounds who value service above self and apply their passion to serving community needs.

Rotary Club of Carmel Valley Fellowship and Events

1. Ensure that the opportunity for fellowship is central to the planning and delivery of all Rotary Club of Carmel Valley meetings and events.

2. Continue to strengthen Rotary Club of Carmel Valley's record and reputation for delivery of successful, dynamic and fun events.

3. Ensure that members have opportunities to participate in Club social events intended to provide fellowship opportunities and FUN.

Strategic Partnerships

We will maintain and expand valued partnerships such as those with the Carmel School District, Kiwanis, The Carmel Valley Association and other charitable and community organizations, and develop new ones as opportunities arise.

Ensure respectful conduct and welcoming environment

Be seen by our members and community partners as respectful and welcoming to everyone by:

1. Maintaining and amending where necessary Rotary Club of Carmel Valley's relevant policies and procedures as laid out in the Club's Bylaws; and

2. Actively ensuring that our members are respectful and welcoming in everything the Rotary Club of Carmel Valley does.

OUR GOALS

Integrate Planning & Budgeting

Implement an integrated Operational Planning and Budgeting process for each Rotary year to be refined based on experience over the life of this strategic plan, ensuring that our plans are based on an accurate, accessible register of Rotary Club of Carmel Valley projects; are supported by relevant Committees, Project Teams and Directors; and are supported in the approved budget and incorporating recommendations by the Board of Directors.

Membership

Increase membership by at least 5% each year; and grow membership by:

1. Continued development of active strategies to recruit new members who are committed to service above self; and

2. Engaging new members in projects that meet their expectations upon joining Rotary; and

3. Increasing transparency of Board meetings/decisions by providing Board meeting minutes to club members; and

4. Using social media to help inform members of club activities and events; and

5. Establishing and sustaining an orientation program to inform/educate new members about Rotary and the Rotary Club of Carmel Valley; and

6. Establishing and sustaining a mentorship program to engage new members and match members' passions to committees and projects; and

7. Learning from any attrition where improvement is necessary to minimize loss of members.

Fund Raising

1. Grow the Rotary Club of Carmel Valley Foundation by at least 20% annually.
2. Plan and conduct at least one fundraising event each year that will produce at least \$20,000.00 of income for the club.
3. Ensure maximum participation by club members in support of Laguna Seca Raceway gate operations during races to maximize club revenue from these events.
4. Ensure maximum participation by club members driving courtesy vans in support of the PURE Golf Championship and the AT&T Pro-Am golf tournaments to maximize club revenue from these events.
5. Leverage Rotary Club of Carmel Valley's Charitable Support in collaboration with the community, philanthropic and corporate sectors to encourage donations and other support to the Club.
6. Create new funding pathways to supplement member dues in financing club administration and operations.

Service Projects

1. Plan and conduct at least eight service projects, programs and events each year that afford the opportunity for significant member participation.
2. Ensure that at least 75% of members participate in one or more service programs, projects or events each year.
3. Continue to plan and conduct the "Partners in Community Service" (PICS) grants program for the seven existing schools. Explore opportunities to expand the program.
4. Follow up on the highly successful TOP 100 event last year with another similar event each year. Improve participation by parents and students.
5. Select at least two students to attend the Rotary Youth Leadership Academy at Camp Royal each year.
6. Investigate opportunities for new Youth Service projects or events that will afford the opportunity for significant member participation.
7. Continue to plan and conduct the highly successful "Santa's Fly In" event each year. Refine and document processes and procedures for the various activities involved.
8. Support Santa's Fly in, Carmel Valley Fiesta, All Saints event and other similar activities with the Rotary Club of Carmel Valley Choo Choo train rides. Maximize club member participation.
9. Continue to conduct community service activities including Rippling River support, Carmel Valley Road trash clean up, immunization clinics, blood drives, holiday lights in the village and other activities/events. Maximize club member participation.
10. Investigate and identify one international project or activity each year that affords members the opportunity to participate in the planning and execution. If possible, arrange for member(s) to visit the project.

Fellowship

1. Plan and conduct at least ten fellowship events each year, including a Demotion Party, athletic events, potlucks at member's homes, and other activities that will afford members the opportunity to get to know each other better, enjoy food and drink together and HAVE FUN! Encourage maximum participation.
2. Whenever possible combine fellowship activities with service projects to afford members the opportunity to engage in fellowship activities in conjunction with service projects and activities.

Public Image and Communication

1. Achieve at least three media placements for club service projects each year.
2. Publicize the club's service activities in advance through the use of posters, bulletins, video clips and other media tools.
3. Leverage the impact of the Rotary Club of Carmel Valley's array of service projects and charitable activities by documenting in text and imagery these activities for the benefit of new members and the community.
4. Maintain the club's webpage and social media accounts. Update at least twice each month. Investigate other channels of communication to community stakeholders and potential new Rotarians.
5. Continue evolving the use of emerging digital communication tools.

Rotary International

Contribute at least \$8,000.00 from the club and our members to the Rotary Foundation Annual Fund.



<https://carmelvalleyrotaryclub.org/>

www.facebook.com/RotaryOfCarmelValley

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A quorum of board members being present, and a majority of those present having voted for adoption, the Strategic Plan of the Rotary Club of Carmel Valley is hereby:

Adopted this 21st day of January 2025

Robert D. Spadoni
Secretary