**The Strategic Plan of the Rotary Club of West Richmond: 2022 – 2026**

**(Adopted by the Club’s Officers and Directors January 12, 2022)**

In spring 2021, with the Covid -19 pandemic still wreaking havoc on the United States and the entire world since its early 2020 onset, with most local, state and national governments instituting vaccine and mask mandates and in-person gathering restrictions, with many civic groups and smaller business organizations struggling to stay active and in business, with this Rotary Club conducting weekly hybrid (in-person and Zoom) meetings and seeing many of its members inactive, Club President Bruce Slough asked the Club’s Directors to approve the launching of a new club strategic plan. His hope was a new plan could and would coalesce the active members and chart a path forward for the club to not only grow, but to grow significantly and dynamically with increased activity and participation, especially as the world would hopefully soon emerge from the pandemic.

Past Club President Brad Nesheim agree to chair the process and recruited 11 club members to serve as the Strategic Planning Team: current President Bruce Slough, President-elect John Vetrovec, Vice President (President Nominee) Ernesto Sampson, Immediate Past President Lee Weisiger, Beth McClelland, Julie Bilodeau, Ted Linhart, David Whitehead, Frank Maloney, Trey Arnold and Jeff O’Flaherty. This team represented the new and veteran make-up of the club.

The Team made the following assessments early:

* After numerous years of growth, the club has lost many members in the past 3 years
* Club should align more with Rotary International and the Rotary District 7600
* Past 15 months have been disruptive with many members inactive
* Club no longer has a ‘signature’ project or event, since the end of Nutzy’s Rotary Funn Run
* Members are questioning the club’s meeting location, costs, times
* Club seems to need a ‘road map’ and a focus on priorities
* Club needs to survey the membership to ask what they want

The Team decided to follow the Rotary International Strategic Planning format and designed a club members’ survey to be launched online in late July. The Team designed this detailed survey, believing that most members would complete it to give the Team very important information and feedback. To enhance member participation, Team members agreed to call 6-7 assigned members each to encourage their survey participation.

The survey, conducted from July 27th to August 13th,revealed many things, including:

* 78 % of our members are over 60 years of age and have been Rotarians for 20 + years
* Only 1 current member is under age 35
* Most of the younger members who had joined over the past 8 years had left the club
* Longer term members tended to give more favorable responses to all questions
* Members with less years of service gave overall lesser ratings than those with longer years of service
* Current members feel very engaged with the club and like what the club does but they want to see changes
* Most members want to see the club’s committees visibly more active with meetings, activities and results. Too many activities are organized by one person with no committee involvement
* The current zoom/in-person hybrid meetings are not effective, and the food offerings leave a great deal to be desired
* Covid has negatively impacted the club’s ability to attract outstanding programs/speakers
* The club needs to grow numerically and in diversity of age, gender, ethnicity, religion, orientation, and professions represented
* Service projects are good but want more projects offered at various times to encourage participation of all members
* Most members want to see an international project supported by the club
* Members enjoy social and fellowship activities and want to see more
* Club must appeal to younger members who want to ‘do things’
* Be more active with Rotary District and Rotary International
* Enhance the club’s leadership training and succession plan
* Focus on each members’ engagement, not their meeting attendance
* Significantly improve the club’s public image, internally and externally
* Additionally, all 250 club members’ comments were recorded and reviewed by the full Team. (Most of these comments pertained to the above bullet points).

The Team presented the survey results at a September Club Assembly.

Decisions made by the Team:

* Align with the Rotary International Vision Statement with one minor change, to change the order of “…across the globe, in our communities…”prior to ‘…and in ourselves.”
* Recognize as a Rotary Club we should continue to look like a Rotary Club in terms of our use of The Four Way Test, The Object of Rotary, The Avenues of Service, the Rotary Diversity Statement and be involved with the International Convention, the Rotary District’s Assembly and Conference in October and April of each year and other District events and training.
* Now is not the time to change the club’s meeting venue
* Ensure a workable two-year agreement with the Westwood Club for weekly meetings
* Added an Action Statement: “Good People Doing Good Things!”
* Developed a brief Statement of the Club’s Strategic Plan with the following:
  + The Club’s Vision Statement: “TOGETHER we see a world where PEOPLE unite in action to CREATE lasting CHANGE in our community, across the globe and in ourselves.”
  + A Statement of Club Values: Fellowship, Engagement, Professionalism, Inclusion, Service, Governance. The world is different than when West Richmond Rotary was founded in 1960. Demographics have shifted, the workplace is mobile, and technology connects us in new ways. However, Rotary values insure we honor our past as we embrace the future.
  + The Mission: “The Rotary Club of West Richmond will be the preeminent service Club in central Virginia, distinguished by the professionalism and fellowship of our meetings, the diversity and engagement of our members, the innovative service projects we perform and the signature event for which we are best known.”
  + The Action Statement: “Good People Doing Good Things!”
  + The Strategic Priorities:
    - Increase our IMPACT through meetings, service projects, signature event
    - Expand our REACH through membership development, retention & nurturing and Public Image
    - Enhance ENGAGEMENT through membership categories, member engagement tracking and fellowship
    - Increase ADAPTABILITY through leader succession, committee chairs, Rotary International and District participation
  + Form these STRATEGIC AVENUE COMMITTEES:
    - Increase our IMPACT

1. Great weekly luncheons, programs
2. Service projects – well planned, various times, local, consider international
3. Signature Event – form action team for recommendation to club
4. Media/Communications/Public Image
5. Fund-Raising – locally, The Rotary Foundation, West Richmond Rotary Foundation

* Expand our REACH

1. Membership Development
2. Membership Recruitment
3. Social Events

* Enhance ENGAGEMENT

1. Rule of 85 modified
2. Vetting of members
3. ‘No-No’ Club
4. Engagement tracking (develop self-evaluation matrix and values)
5. Member retention and nurturing

* Increase ADAPTABILITY

1. Governance – leadership succession planning
2. Committee Chairs – recommend to President-Elect
3. Presidents-Elect Training Seminar (PETS)
4. District Conference and Assembly
5. RI Annual Convention
6. Train and Develop
7. Club Assemblies
8. Regular club committee meetings

* Adopted the Club Officers and Directors Organization Chart that aligns with the Strategic Priorities assigned to the Vice President and 5 Directors. This chart is included with this detailed Strategic Plan explanation.

**Rotary Club of West Richmond: 2022 – 2026 Strategic Plan**

**Team Comments Related To The Strategic Plan Decisions**

* **Vision Statement.** This very closely mirrors the wording of the Rotary International Vision Statement. We changed the word ‘communities’ to ‘community’ and the order of the last sentence to “…in our community, across the globe and in ourselves.”
* **The Values of the Rotary Club of West Richmond**: We selected thoughts from our members’ survey and the Rotary International Values that we believe reflect the desires of our members to move our club forward.
* **The Mission of the Rotary Club of West Richmond**:Captures the essence and focus of this Strategic Plan in a concise, easy to understand manner.
* **The Action Statement of the Rotary Club of West Richmond**:We liked this phrase so much that we actually ‘stole’ it from one of the member surveys comments.
* **The Strategic Priorities:** These four priorities mirror those of Rotary International. We decided to align and package what we see as the most important needs of our club with these RI priorities
* **The Governance Team:** A major concern to many club members and to the planning Team was that several club officers and directors had been ‘rushed’ into leadership roles too quickly, without having been Rotarians for very long and not having served on or even chaired club committees. This is not to say that these excellent Rotarians were not capable of leading, but our club had a long-standing track record of nurturing club leaders through a succession plan allowing them time to learn about Rotary for a few years prior to being asked to step into a leadership role. Many new Rotarians are trying to balance their Rotary membership and time involvement with other aspects of their lives, and by ‘rushing’ them into leadership roles too quickly, they can become easily overwhelmed. In recent years, several very good Rotarians resigned from the club for this very reason, and we don’t want to see that repeated. The idea with the Governance Team is to involve several past club presidents serving in advisory and influential roles to the Club Presidents and Presidents-elect to help with the identification and recruitment of committee chairs, directors and officers of the club. The Governance Team will not serve as club directors or officers, with the exception of the Immediate Past President of the club, who will serve as the chair the Team. Members will serve staggered two-year terms. Also, members of this Team will be asked to assist with ‘club moments for mission’, fireside chats and to mentor club members. Ideally, we would like to see the club return to a multi-year leadership succession plan that will allow selected Rotarians to grow and evolve with the club as they become more experienced.
  + Other comments regarding the Governance Team. Over time, many of our club’s veteran members, many of whom are ‘Rule of 85’ members, are either declining to, or are not being asked, to assume leadership roles. A Rule of 85 member is an active Rotarian whose age and years in Rotary meet or exceed 85. The club needs all of its members, newer and older, to be involved. After all, we are all Rotarians!
  + We believe it is time to once again follow our club’s ‘No-No’ mantra. The last time a Rotarian had a chance to say ‘no’ to the needs of the club was when they said ‘yes’ to membership.
  + We believe that our club needs to have more Rotary education and training for all of its members, and we have tasked the Governance Team with responsibility to ensure this happens. This will include a thorough vetting and orientation of potential members, an in person social event ‘fireside chat’ training session with new members shortly after their induction. Additionally, periodically, selected Rotarians should give brief ‘what Rotary means to me’ talks at club meetings, encourage members to read ‘Rotary’ magazine and to support the Rotary District’s Strategic Goal # 1, to “Develop and encourage Rotarians to attend and experience high quality and useful training experiences through district events that are relevant to member, club, district and leadership needs.”
* **Officers’ and Directors’ Roles:** the club leadership organization will still consist of 7 officers: the Immediate Past President, President, President-elect, Vice President (President Nominee), Secretary, Treasurer, and Sergeant-at-Arms. We see the need to increase the number of Directors from 4 to 5 since they, along with the Vice President, will be assigned to lead the Strategic Priorities. It makes sense that the Rotarians who are leading the club’s most important initiatives are also the club’s leaders. This will enhance communication, reporting and action since these priorities can be addressed at each month’s Directors’ meeting.
* **Leadership of the Strategic Priorities:** We organized the 4 priorities of IMPACT, REACH, ENGAGEMENT and ADAPTABILITY into 7 leadership teams.
  + IMPACT was so encompassing that we broke it into 4 teams – Fund Raising, Public Image, Programs and Service Projects and the new Signature Event. Three of these will be led by Directors with the Vice President leading the Programs and Service Projects.
  + We believe the VP should personally lead the Service Projects efforts but recruit a club past president to lead the organization of the club’s weekly Programs. This Programs Chair should serve for two years since the efforts to arrange key speakers and programs can often require many months of prior commitment. We also recommend that the Programs Chair recruit Rotarians to chair weekly programs for assigned months, preferably with monthly themes.
  + The Fund-Raising priority includes the club’s annual giving to The Rotary Foundation, internal encouragement of members to support the West Richmond Rotary Foundation and to coordinate any other fund raising necessary to support the club’s efforts and needs. This Director needs to be part of the annual club’s operating budget development.
  + The Public Image Director needs to coordinate the important internal club communications but also the critical external communications needed to let the world know of the great things our club is doing.
  + The Signature Event Director will spend the first year forming a committee that can explore the myriad options available that can galvanize our members to conduct a multi-year effort that positively enhances and changes lives in a positive way. After the new event has been adopted by the club, this Director will annually either serve as the event chair or have a key role with the event.
  + The REACH priority Director will coordinate two separate, but cooperating committees: New Member Development and Member Retention and Social and Fellowship Events.
  + The ENGAGEMENT priority Director will be vetting and tracking each club member’s engagement commitment. The idea is not for the club to keep score of a member’s involvement, but rather, support each member to establish annually what they want their engagement to be regarding attendance and participation in meetings, service projects, fund-raising, new member recruitment, etc. We believe that each Rotarian needs to determine what his or her engagement will be.
  + The ADAPTABILITY priority will be led by the Immediate Past President who will chair the newly created Governance Team.
    - Other comments regarding the Governance Team. Over time, many of our club’s veteran members, many of whom are ‘Rule of 85’ members, are either declining to or are not being asked to assume leadership roles. It seems that we believe that these members ‘been there, done that’ and it is time for others to step up. A Rule of 85 member is an active Rotarian whose age and years in Rotary meet or exceed 85. The club needs all of its members, newer and older, to be involved. After all, we are all Rotarians!
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* **The Strategic Planning Documents are stored in DaCdb, in the Club Files icon, in the Secure tab.** All of the documents relating to this Strategic Plan will be stored in the club documents section of the DaCdb club database.