



**Rotary Club of Chicago  
Five-Year Strategic Plan  
July 2020**

## Rotary Club of Chicago Strategic Plan

### Creating the Plan

#### *Why do a strategic plan?*

A strategic plan helps to organize our thoughts, align an organization around common goals, articulate and prioritize strategies, and hold ourselves accountable. A strategic plan is a roadmap for an organization, but it also serves as a marketing tool to potential members and partners. The strategic planning *process* is as important an outcome as the ultimate plan itself. It energizes members and stakeholders, helps them feel heard and part of organization, and creates buy-in.

#### *Key tenets of the plan*

The Plan should be a “living” document: an effective plan is intended to be read, used, applied, and revised. Strategic plans are typically 5 years to allow for more aggressive goals and strategies; however, they can be updated sooner if deemed necessary by the Board.

The key question to be answered in the plan is: What do we want the Rotary Club of Chicago to be in 5 years? To answer this question, the Plan should reflect the interests of our Club members, but also other stakeholders, partners, and potential members, to the extent possible. This includes alignment with Rotary International’s vision, mission, and goals.

Vision and mission are drafted based on initial feedback and guide the development of the Plan. The Plan then is organized around broad “goals” that fit within the mission/vision, which can then be broken down into more specific “objectives,” which are realized through actionable “strategies.”

Finally, an implementation approach is developed to ensure the Plan can be realized. This includes assigning responsibilities, tracking and reporting progress, and generally ensuring accountability and transparency.

#### *Overall approach*

The Rotary Club of Chicago Board created a small ad hoc committee to create the plan with input from the members and stakeholders. The committee first assessed the existing conditions of the club based on available data in late 2019.

Outreach was conducted to understand members’ assessment of existing conditions and desired direction. The outreach included an electronic survey; focus groups; targeted one-on-one meetings; club membership meeting presentations and discussions; and board meeting presentations and discussions. The one-on-one interviews were conducted by strategic planning committee members. The nine Rotarians interviewed ranged from newer members (9 months) to long standing members (30 years). The focus groups were done with the International Service Committee; Community Service Committee; and Rotaract Club of Chicago.

The feedback from all of these outreach efforts serves as the bedrock of this Plan.

The draft plan was sent to board for review and feedback; then to the membership for review and feedback. Finally, the Strategic Plan was approved by the Board on July 7, 2020.

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## Existing Conditions and Trends

Clubs such as ROTARY/One within Rotary District 6450 all report data to Rotary International; these data are readily available online at the Club and District level. While much of the reporting is incomplete or inconsistent for several of the metrics, data for membership (reporting excludes honorary members), gender of membership, and Rotary Foundation (the foundation associated with Rotary International) contributions are the most complete.

Table 1 shows the trends over the last four Rotary years (July 1 to June 30) for our Club and our District. The data show that:

- District membership is decreasing while ROTARY/One’s increases;
- The proportion of female membership is increasing similarly for the District and ROTARY/One; and
- ROTARY/One giving to the Rotary Foundation tracks roughly with District (2018/2019 is an anomaly due to a special, one-time donation).

**Table 1. Comparison Between ROTARY/One at District 6450 for Membership, Gender, and Contributions**

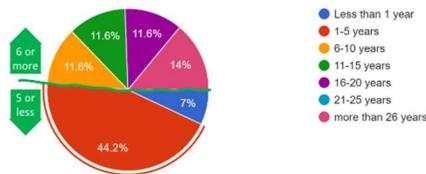
Rotary Year	Membership			Rotary Foundation Contributions			Gender (% Female)	
	Club	District	Club % of District	Club	District	Club % of District	Club	District
18/19	150	1,770	8.5%	36,000	279,000	12.9%	34%	36%
17/18	134	1,800	7.4%	21,000	299,000	7.0%	35%	35%
16/17	121	1,860	6.5%	18,000	249,000	7.2%	31%	33%
15/16	125	1,930	6.5%	16,000	259,000	6.2%	32%	32%

## Input from Our Members

### Member Survey

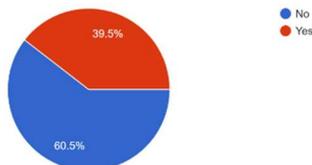
This section provides a summary of some of the key results of the survey implemented in late 2019.

1. How long have you been a member of Rotary One?  
43 responses



Forty-three members responded to the survey. These respondents were equally split between those who have been a member of ROTARY/One 5 or less years and those who have been members for 6 or more years. About one-quarter have been members for 16 or more years, and several respondents are new to the Club. Forty percent of respondents were previously members of other Rotary Clubs; five of them moved from other clubs within the Chicago area.

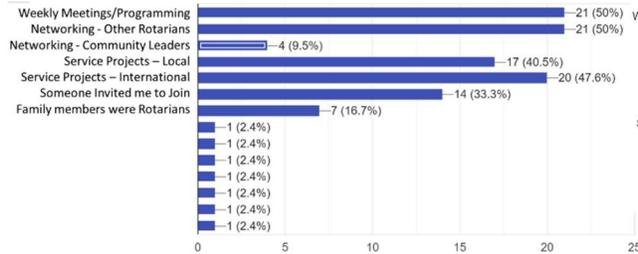
2. Have you previously been a member of another Rotary Club?  
43 responses



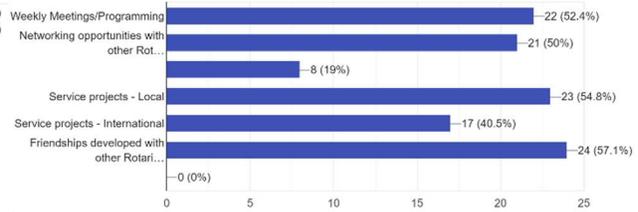
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These members had many reasons for joining ROTARY/One, but the most common reasons were the programming, networking, and service projects (particularly international service). While they continue to remain members for many of the same reasons, local service projects became more important, as has the importance of friendships that have been created.

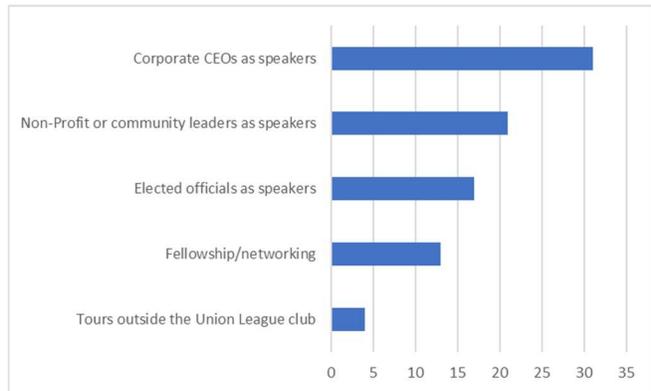
3. Why did you decide to join Rotary One (choose up to 3):  
42 responses



4. Why do you continue to remain a member (choose up to 3):  
42 responses

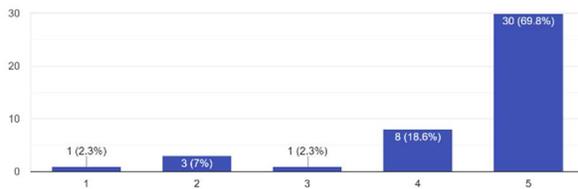


Respondents prefer lunch meetings over evening meetings by an 80 to 20 split; similarly, tours outside the Union League Club (which are common evening programs) ranked low among program choices. Corporate CEOs, non-profit leaders, and community leaders ranked as the highest preferences for speakers.

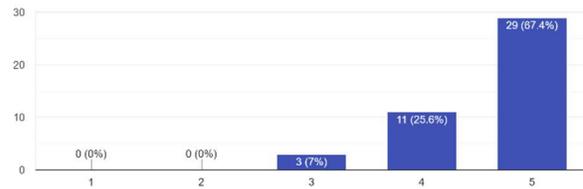


The quality of the meeting experience at the Union League Club, including the space itself, geographic location, and meal quality ranked highly. Members commented on the quality of the staff and the impressiveness and pride in the space, but a few commented on expanding the selection of food.

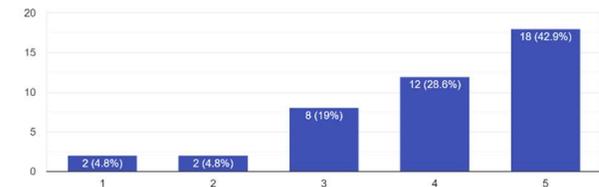
Quality of space  
43 responses



Convenience of location  
43 responses



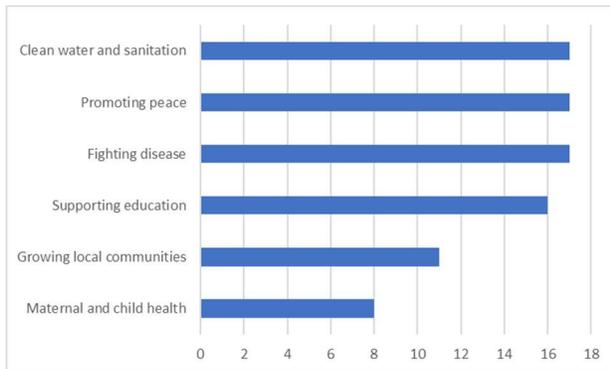
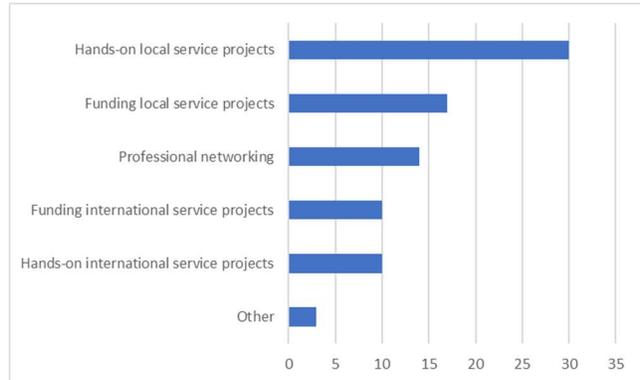
Quality of meal  
42 responses



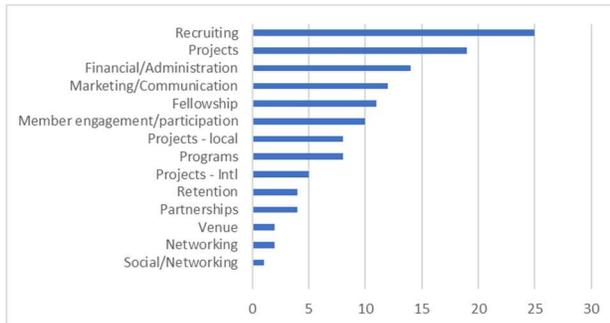
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Almost the entire set of respondents ranked the overall value for money as a member of ROTARY/One as average or above, with 68 percent ranking it high or very high.

Looking towards the future, members listed hands-on projects as the number one priority of the club, with a focus on local projects. Professional networking, including opportunities for networking with other organizations, was also a priority. Members specifically articulated membership engagement and growth as a key part of all of these priorities.



In considering service projects, respondents were asked to rank their order of preference using Rotary International’s six areas of focus. Clean water and sanitation, promoting peace, fighting disease, and supporting education were all almost equally among respondents’ top priorities.



Members provided hundreds of ideas on the most important things for improving the club over the next five years. The suggestions most commonly involved recruiting, service projects, financial or administrative items, and marketing or communication.

The survey also asked members how they learn about Club events and news, and how they would like to be communicated with. Currently email, the Gyrator, and announcements at meetings are most common, but these are also the communication tools most frequently used currently by the club. Members reflected on how they like to get information from other organizations, and email was still the most prevalent (with mixed opinions on the frequency and content of current ROTARY/One emails); however, social media and text were also popular choices.

### *Interviews and Focus Groups*

Appendix A has a summary of the nine interviews and three focus group inputs. Generally, the feedback was consistent with the survey. Specific themes on service include:

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- Hands-on projects: a service component should be part of projects we fund (local or international)
- More focused and deliberate: quality and impact over quantity
- Service opportunities should be regular and predictable
- Build and leverage relationships with other organizations
- Communicate results after the events or projects

Other key themes identified in the interviews and focus groups include:

- Better communicate Rotary's internal processes
- Outreach, advertising, and marketing should be improved
- Opportunities for networking, socializing, and fun are important

### Mission Statement

Vision and mission statements define at a high level, and in a single statement, what an organization at its core is all about, and why it exists. Several vision and mission statements currently exist in Rotary that can serve as reference points for a new Club mission statement:

- **Rotary International Vision.** To promote ethical leadership, professional success and friendship among Club members through service in our community and around the world.
- **Rotary International Mission.** Together, we see a world where people unite and take action to create lasting change, across the globe, in our communities and in ourselves.
- **Old ROTARY/One Mission.** We provide service to others, promote integrity, and advance world understanding, goodwill, and peace through our fellowship of business, professional, and community leaders.
- **The Four-Way Test.** Is it the truth? Is it fair to all concerned? Will it build goodwill and better friendships? Is it beneficial to all concerned?

Based on the priorities of our membership, the new mission statement of ROTARY/One is:

*Through our fellowship of diverse, ethical individuals, we work together to have a transformative impact on our internal and external community.*

### Goals, Objectives, and Strategies

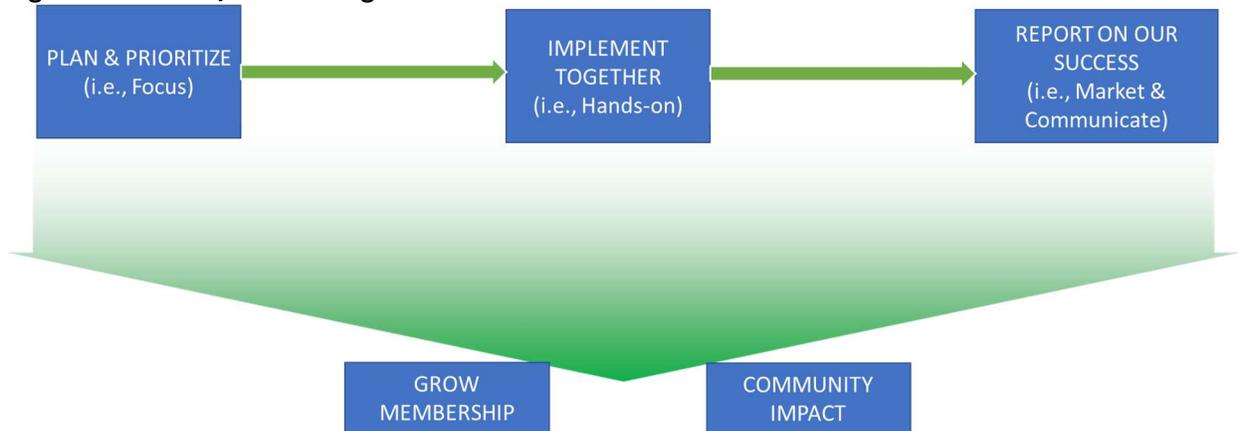
Goals in a strategic plan highlight at a high level the key priorities for the organization. Based on the outreach results, the Strategic Planning Committee identified five high-level goals that capture the essence of the mission statement (Figure 1):

- Plan and Prioritize (i.e., focus the efforts of our time and money and improve internal processes)
- Implement Together (i.e., find opportunities to engage our members in the implementation of hands-on service projects)
- Report on our Success (i.e., market and communicate our projects, programs, and impact both internally and externally)
- Grow Membership (while this includes membership-focused strategies, the Plan recognizes that the success of the above goals will positively impact this goal)

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- Impact the Community (the success of the above goals will result in the success of this goal to “move the needle” in Chicago and abroad)

**Figure 1. ROTARY/One Strategic Goals**



The strategic goals are further defined by specific objectives; The objectives are realized through actionable strategies (Table 2). Many of the objectives and strategies will impact multiple goals.

**Table 2. Objectives and Strategies**

Goal	Objective	Strategy	Champion
Plan & Prioritize (Focus)	Focus investments of time and money to maximize impact	Develop committee plans that align with strategic plan, and prioritize: <ul style="list-style-type: none"> <li>- geographic, topical focus;</li> <li>- ease of access to project location;</li> <li>- service component;</li> <li>- building expertise</li> <li>- impact (fewer projects, greater impact)</li> </ul>	Service committee chairs
		Identify home-grown project concepts that fit within our priorities and that we can take ownership of	Service committee chairs
Institutionalize strategic planning process		Measure progress and review and report quarterly	President; support by Administrator
		Hold transitional board retreat prior to each new Rotary year and review plan	President; support by Administrator
		Major update to the plan every 5 years, or earlier if major changes needed	President
		Survey club members once per year	President; support by Administrator

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	Standardize administrative processes and make them transparent to members	Make board meetings accessible to members	President; support by Administrator
		Create (and update as needed) duties and expectations for various roles within the club	President
		Review and, if needed, update bylaws when undertaking a major update to the strategic plan	President
		At the annual meeting, explain to members the nominating process for Club leadership	President
Implement Together (Hands-on)	Engage members in implementing service projects	Incorporate service and accessible geography as priority screens in committee plans (see Plan & Prioritize)	Service committee chairs
		Identify a "volunteer coordinator"	President
		Create online volunteer signup platform	Volunteer coordinator; support by Administrator
		Recognize volunteer work	President
		Expand community service opportunities for members	Service committee chairs
		Expand club service opportunities for members: - Welcoming Group/Sergeant at Arms - Marketing/PR - Volunteer coordination - RI coordination - Alumni coordination	President; support by Administrator
Report on our Success (Market & Communicate)	Advertise internally our activities and results	Create a marketing/PR committee, and create an annual plan	Board; new PR committee chair
		Reconstruct the website	Board; Administrator
		Put all member events on the calendar	Administrator
		Create a monthly "social media plan"	New PR committee chair; support by Administrator

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		Empower members to post on social media	New PR committee chair; support by Administrator
		Advertise and promote our social media channels	Administrator
		Utilize texting as an additional means of communicating with members	Administrator
		Evaluate current email protocol	Administrator
		Host recipients of our money and time as meeting guests who discuss our impact	President
		Create videos of signature projects and programs	New PR committee chair; support by Administrator
		Ensure all service projects by Club listed at every weekly meeting, with targeted verbal updates	Administrator; Service committee chairs
	Advertise externally our activities and results	(see all strategies for “Advertise internally our activities and results”)	
		Create impact statement for ROTARY/One	New PR committee chair
		Market the "speaker program" separately, and leverage our strong programs to bring in prospective members, bring in infrequent attendees, and to add value for current engaged members	New PR committee chair; Programs Chair
		Collaborate with the ULCC regarding programs	New PR committee chair; Programs Chair
		Leverage international reputation to market to international organizations	New PR committee chair
		Connect with media outlets for signature events	New PR committee chair; support by Administrator

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		Identify outside locations for paid advertisement	New PR committee chair; support by Administrator
Grow Membership	Increase the value/experience for members	Maintain variety of strong programs, with emphasis on Corporate CEOs, NFP CEOs, and Community Leaders	Programs Chair
		Leverage technology for meetings	Administrator
		Ensure a broad range of speakers at the podium each meeting	President
		Increase fellowship time at meetings or other opportunities, e.g., home dinners	Social coordinator; President
		Incorporate RI opportunities into club meetings, e.g., fellowships and RAGs	RI coordinator; President
		Promote members' businesses in meetings and materials	Administrator
	Increase new members	Reach out to new prospective members/referrals	Membership chair
		Identify other groups to engage, and send a member to promote Rotary (e.g., international chambers of commerce, Greek organizations)	Membership chair
		Market downtown residents	New PR committee chair
		Create a Rotary Alumni group that stays connected to, and invites to meetings, people with connections to Rotary	New alumni coordinator
		Leverage "welcoming group" to introduce prospective members at meetings to other members, and sit with prospective members	New welcome coordinator
	Increase member retention	Update member orientation process	Membership chair
		Identify committed members to "orient" new members	Membership chair
		Leverage "welcoming group": Seat new members at different tables each week; sit with new members; introduce them to different members	New welcome coordinator

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		Assign a role to new members within 1 month of joining, starting with "greeting" or "thought of the day."	New welcome coordinator; Thought of the Day coordinator; support by Administrator
		Call infrequent attendees twice/year	President Elect
		Implement and maintain a professional mentoring program	Immediate Past President
	Diversity/inclusion (Be deliberate in seeking diversity of occupation, nationality, ethnicity, race, gender, sexual orientation, background, and perspective)	Identify other groups to engage, and send a member to their events to promote Rotary (e.g., international chambers of commerce, Greek organizations)	Membership chair
		Identify other groups to engage, and send an invitation to our meetings	Membership chair
Community Impact	"Move the needle" in Chicago	Measure impact of projects we implement	Service chairs
		Implement visible projects	Service chairs
	"Move the needle" in international locations	(see strategies for "Move the needle in Chicago" above)	
	Support our internal Rotary community	Implement and maintain a professional mentoring program	Immediate Past President
		Promote members' businesses in meetings and materials	Administrator
		Promote our personal accomplishments	Administrator
		Connect with our members	President Elect

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**Implementation**

The most challenging part about creating a successful strategic plan is making it a reality. The implementation framework in Table 3 presents the mechanisms through which the goals above will be realized over the next five years.

**Table 3. Implementation Framework**

Measures	Performance measures to track progress towards goals and objectives.
Targets	Specific targets we hope to achieve for each measure, annually and at the end of 5 years. Our targets should be reevaluated every year. They should be reasonably achievable while still encouraging us to stretch our limits.
Champions	Assigned responsibility for overseeing the implementation of each strategy (see Table 2 above).
Tracking and Reporting	<p>Accountability for achieving our plan:</p> <ul style="list-style-type: none"> <li>• Champions report back on status of their strategies at board meetings once per quarter</li> <li>• Some champions may not be board members: they may attend board meetings, or may report to the President on status</li> <li>• The Club Administration team supports these updates with data for the measures</li> <li>• Reporting can be more or less frequent as needed and to avoid an onerous level of effort</li> <li>• Summary of progress presented to membership once per quarter after board update</li> </ul>

Table 4 provides the high-level performance measures, and associated targets, that are part of the implementation framework. These measures are limited in number, data are available, they will change within the timeframe of our plan, and they are outcomes resulting from the strategies in the plan. Targets create a starting point for which we can aim; these may be adjusted each year if outcomes are vastly different.

**Table 4. Performance Measures and Targets**

GOAL	MEASURE	TARGET
Plan & Prioritize	Positive perception of club (as determined by “overall value of money you feel you get as a member of ROTARY/One”), and sense of improvement over prior year, by members as identified in annual member survey.	<ul style="list-style-type: none"> <li>• Currently 67.5% of respondents rate 4 or higher (high and very high value for money) on a 5-point scale.</li> <li>• 1-year target: 75%</li> <li>• 5-year target: 90%</li> </ul>
Implement Together	Percent of service committee funds spent on projects with hands-on opportunities	1-year and 5-year target: 75%
	Percent of members who volunteered	<ul style="list-style-type: none"> <li>• 1-year target: 35%</li> <li>• 5-year target: 50%</li> </ul>
Report on our Success	Website, Social Media tracking metrics (exact metrics established by new Marketing/PR Committee)	Exact targets established by new Marketing/PR Committee

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	Member awareness of Club projects based on annual member survey (exact survey question to be determined in future years)	Exact targets to be determined in future years
Grow Membership	Total members	<ul style="list-style-type: none"> <li>• Current membership: 144 regular members (169 including honorary)</li> <li>• 1-year target: 155 (180)</li> <li>• 5-year target: 200 (225)</li> </ul>
	Average membership duration	<ul style="list-style-type: none"> <li>• 1-year target: 0.5 year increase</li> <li>• 5-year target: 1.5 year increase</li> </ul>
Community Impact	Project-specific metrics regarding persons impacted (available at project completion)	Project-specific

These performance measures, reported to the Board and then the membership every quarter, can be shown in a dashboard style for easy data visualization (Figure 2).

**Figure 2. Sample Visualization of Performance Measures**



The progress of each strategy will also be tracked in a format similar to Table 5.

**Table 5. Strategy Progress Tracking**

Objective	Strategy	Champion	Status	
Advertise internally our activities and results	Reconstruct the website	Board; Administrator	In progress	In progress
	Create a monthly "social media plan"	New PR Committee Chair; support by Administrator	Not started	Not started
	Strategy X	President	Achieved and ongoing	Achieved and ongoing

### Commitment to Continuity

The current and future leadership of the Rotary Club of Chicago, including the 2019/2020 President; President Elect; President Nominee; President Designee; 2019/2020 Board; and 2020/2021 Board were engaged in the creation of this plan. The current and future leadership of the Club commits to the implementation of this plan.