

FUNDRAISING AND FUND ALLOCATION		PAST PRESIDENT: JEFF WERTHAN	
Action	Measurable Outcome	Target Completion Date	Lead/ Resources Needed
1. Increase moneys available to support service projects through Investment Fund Management and Allocation Process			
1.1 In 2023/24 continue the current 4% draw from the Unrestricted Fund 1.2 In 2023/24 increase draw from Bayles Restricted Scholarship Fund to 4% 1.3 In 2023/24 transfer \$30,000 of surplus funds from the aggregate surplus in both the Unrestricted Fund and in the Bayles Fund into the 2023/24 service fund for distribution to committees and line items. <i>The Service Fund will verify that any surplus from the Bayles Fund will go to Scholarships.</i> 1.4 Convene the Service Fund Board to consider a plan to ensure the maximum amount of funds are distributed annually to support the service fund work. We recommend the Service Fund Board consider minimum and maximum amount of funds available and distribute those funds accordingly. 1.5 Recommend the Gift Acceptance Committee retroactively apply the Gift Acceptance Policy to the 2022 Sizemore gift 1.6 Recommend that the Gift Acceptance Committee transfer <i>one third</i> (\$115,000) from the original Sizemore gift into the Bayles Restricted Scholarship Fund.	1.1 The transfer of funds into the current year budget 1.2 Scholarship committee receives 4% draw. Additional allocations from available funding may be made per Presidential discretion. 1.3 <i>\$30,000 of surplus funds allocated by 23/24, Club President and Service Fund will verify any Bayles Fund surplus will be identified for distribution to scholarships</i> 1.4 The Service Fund Board evaluates and reports to the Club by the end of Rotary Year 23/24. 1.5 Gift Acceptance Committee reports their decision regarding recommendations	Annually	Service Fund Board, President, Club Board
2. Increase moneys available to support service projects through fundraising and other strategies			
2.1 In 2023/24 focus Club participation towards increasing net income from the Annual Fundraiser 2.2 Charge the Fundraiser Committee with creating a variety of avenues of participation (time/treasure/talent) to ensure 100% club member participation in annual fundraiser. 3. Form a committee to review and recommend alternative fundraiser models for 24/25	2023/24 Fundraising Committee reports participation and net income raised through annual fundraiser President appoints exploratory committee		Linda Fukuda, Fundraising Committee, 100% members
4 .Explore niche fundraisers, including, but not limited to Polio Plus.	President appoints exploratory committee(s)	2023-2024	
5. Annually secure a minimum of 1 <i>District Matching Grant</i> 6. Evaluate global grants where applicable	Club reports status of <i>District Matching Grant</i> award(s) to the Club		
7. Educate club members on matching points and their relevance to the Rotary Foundation and impact on fundraising	Marketing and Branding committee provide educational produces and Club President secures time for presentation		

FOCUS AREA: PUBLIC IMAGE/ BRANDING		PRESIDENT: LISA EDWARDS		
Action	Measurable Outcome	Target Completion Date	Lead	Resources Needed
1. Increase public awareness of UDRC				
1.1 Form a Public Image committee to oversee UDRC branding and coordination of promotional strategies and secure resources for funding	1.1 Committee formed with at least 5 members and creates a plan for promotional campaigns	December 2023		Funding for marketing services
1.2 Create key messages that communicate our value proposition	1.2 Four key messages adopted for use in promotional campaign	December 2023		
1.7 Update Logo with key messages	1.3 Logo updated with 4 key messages	December 2023		
1.8 Redesign public facing materials	1.3 Recruitment brochure and informational materials updated	February 2024		
1.9 Create UDRC Rotary Wheel logo wear for members to wear and promote the club in the community		November 2023		
1.10 Collect Stories that showcase our impact	1.4 At least 8 stories collected and used in promotional posts	March 2024		
1.11 Employ innovative ways to tell our story	1.5 At least 2 innovative strategies implemented each year	Annually		
2. Partner with other organizations to co-brand and cross promote UDRC				
2.1 Invite speakers, grant recipients and scholarship winners tag and promote UDRC	2.1 At least 8 tags for UDRC per month	Annually		
2.2 Access public tv and radio for PSA announcements	2.2 Two new PSA placements each year	Annually		
2.3 Promote other organizations to position UDRC as a community influencer	2.3 Monthly cross promotions launched	Annually		
3. Grow public image team and club marketing capabilities				
3.1 Update UDRC website to improve user experience	3.1 New and improved website launched	December 2023		
3.2 Increase public access to weekly newsletter				
3.3 Increase admin access for social media accounts from 3 to 6 users	3.2 Three new contributors recruited and trained	2023-2024		
3.4 Launch a Marketing & Communications internship to support branding and public image campaigns	3.3 One to three interns recruited and hired	December 2023		
3.5 Acquire content management system to coordinate postings with monthly schedule	3.4 Content management system acquired, and monthly posting schedule followed	2023		

4. Launch Marketing to Support Strategic Priorities				
4.1 MEMBERSHIP: Launch lead generator on web and on social media to recruit potential new members	4.1 Lead generator created and active on website and social media	2023		
4.2 MEMBERSHIP: Create and post profiles of new members on website and social media	4.2 Profiles created and posted for each new member within 2 weeks of induction	Annually		
4.3 MEMBERSHIP: Launch Targeted Social Advertising to target potential new members according to demographic criteria	4.3 At least 3 digital campaigns launched each year	Annually		
4.4 MEMBERSHIP: Update membership brochure with new service activities and profiles of members in action	4.4 Brochure updated with new service activities	Annually		
4.5 MEMBERSHIP- Develop recruitment pitch and train club members	4.5 Club members trained on new member recruitment	Annually		
4.6 FUNDRAISING: Promote Fundraising Events for UDRC to increase donations	4.6 Fundraiser and Niche fundraisers boosted to increase club visibility and donations	Annually		
4.7 SERVICE- Regularly promote community and international service projects on website and social media	4.7 Quarterly posting updates the community on all service projects	2023-2024 2024-2025 2025-2026		
4.8 PUBLIC IMAGE-Create annual budget line item for marketing and promotion of club				

GOAL: KEEP THE MEMBERS THAT WE HAVE AND GROW MEMBERSHIP TO 125		PRESIDENT ELECT: LINDA FUKUDA		
Action	Measurable Outcome	Target Completion Date	Lead	Resources Needed
1. Offer a variety of club meeting/service options for people with work and life commitments				
1.1 Survey each member to understand what members are seeking and what prevents them from participating in meetings/service projects	1.1 Survey delivered to at least 2/3 of members. Results analyzed by membership and retention committees	DEC 2023	Membership and Retention Committees	
1.2 Recommend 1-2 annual actions for increasing member engagement and retention	1.2 Add at least 1 activity each year over the next 3 years	2023-2024 2024-2025 2025-2026		
2. Members are showing up, involved and having fun				
2.1 Measure and report member participation in every activity to membership and retention committees	2.1 Results analyzed 2x a year.	2023-2024 2024-2025 2025-2026		
2.2 Review participation rates in activities and meetings and recommend changes to increase members having fun	2.2 Make annual adjustment to activities and meetings to increase member participation and engagement. Modify or eliminate activities and events with lowest participation rates	2023-2024 2024-2025 2025-2026		
3. Maintain a 95%-member retention rate				
3.1 Offer in-person new member orientations with sponsor or appointee	3.1 New member orientations are held in person with sponsor. Opportunities for participation are provided monthly to new members by sponsor	DEC 2023		
3.2 New member is guided by their sponsor or appointee to ensure engagement with the club	3.2 New members actively participate in club activities and meetings	2023-2024 2024-2025 2025-2026		

<p>3.3 Continuously reach out to members to learn how “we” and “they” are doing especially in regard to our club</p>	<p>3.3 Quarterly check ins with members to gauge satisfaction</p>	<p>2023-2024 2024-2025 2025-2026</p>	<p>Membership and Retention Committee</p>	
<p>3.4 Explore offering family friendly activities and projects to engage extended family</p>	<p>3.4 Pilot a family friendly activity to gauge member support and then make recommendations for future activities in Years 2 and 3 based on participation satisfaction</p>	<p>2023-2024</p>		
<p>3.5 Hold exit interviews for all departing members. Membership and Retention Committees examine feedback and make recommendations to club president & board</p>	<p>3.5 Annually, membership and retention committees examine exit interview feedback from all departing members and make recommendations to club president and board</p>	<p>2023-2024 2024-2025 2025-2026</p>		

FOCUS AREA: SERVICE PROJECTS		PRESIDENT ELECT NOMINEE: PAULA DAY WILLIAMS		
Action	Measurable Outcome	Target Completion Date	**Lead**	Resources Needed
1. Expand UDRC efforts to address: (a) local quality of life issues, (b) the education of our youth, and (c) environmental clean-up				
1.1 Expand UDRC investment in programs that address: (a) Homeless/Housing assistance, (b) Food insecurity, (c) Warm clothes and (d) General, maternal, dental (eg dental van) and mental health.	Measured by comparison to existing investment	06/30/2026	Carol Butler Rick Jones Wendy Reilly Son Michael Pham (c)	Funds PeoplePower **Please contact Lead to get involved with these projects.**
1.2 Increase our investment in the education of our youth including, but not limited to: (a) projects that address education-related issues for our elementary through secondary students, (b) providing speakers to local schools, (c) mentorships, (d) tutoring, (e) college/ scholarship application preparation and (f) scholarships. Consider additional assistance for children of immigrants/refugees (g).	Measured by comparison to existing investment	06/30/2026	Suzanne Griffin Linda Fukuda (e), (f) Tony Ives (e), (f) Son Michael Pham (g)	Funds PeoplePower **Please contact Lead to get involved with these projects.**
1.3 Expand awareness of and participation in projects that improve our environment.	Measured by comparison to existing investment	06/30/2026	Dave Spicer	Funds PeoplePower **Please contact Lead to get involved with these projects.**
2. Strengthen relationships with local organizations providing essentials goods and services				
2.1 Partner with businesses and other local non-profits— including, but not limited to, the expansion/strengthening of existing relationships, particularly: (a) UHeights, (b) YMCA, (c) Ronald McDonald House, (d) Roots, (e) Women United/ Mayor’s Council on African American Elders/Maverick Cares. (f) Expand our involvement with Rotaract. (g) Solid Ground, (h) Boys & Girls Club, (i) Rosy’s Tiny Houses, (j) Pea Patch/City Community Gardening, (k) Projects that improve the lives of Duwamish tribe members	Measured by comparison to existing investment	06/30//2026	Carol Butler Rick Jones Wendy Reilly Son Michael Pham (c) Paula Williams (e) Suzanne Griffin (f) Marella Alejandrino (g) Sala Sweet (h), (i) Wendy Reilly (j) Sheila Hosner (k)	Funds PeoplePower **Please contact Lead to get involved with these projects.**

3. Expand the number of community-based and international service projects funded by UDRC				
<p>3.1 Expand our community investment in/ allocation of resources to include additional community-based projects—both sustainable and non-sustainable—as determined by the Club to need our assistance. To include one major project (>\$5K) each year. There is a specific procedure for the Club investing in projects. Such procedure is not expected to change.</p>	<p>Measured by comparison to existing investment</p>	<p>06/30/2026</p>	<p>Carol Butler</p>	<p>Funds PeoplePower **Please contact Lead to get involved with these projects.**</p>
<p>3.2 Increase our investment in/allocation of resources for international service projects, as needed. To include one major project (>\$5K) each year. We have a long history of trusted international relationships—all thoroughly vetted—and continue to receive requests from new ones. We follow a specific procedure to confirm eligibility of all new international projects.</p>	<p>Measured by comparison to existing investment</p>	<p>06/30/2026</p>	<p>Sheila Hosner</p>	<p>Funds PeoplePower **Please contact Lead to get involved with these projects.**</p>