	Strategic Plan 2024
Bloomington Rotary	

Vision: Bloomington Rotary Club envisions a diverse, engaged community of leaders whose fellowship and service have a significant, positive impact locally and globally.

Key:
Outcomes: end points or public benefit results for which a level of success can be determined
Objectives: specific targets for improved performance; represent milestones or intermediate achievements necessary to realize the desired outcome
Strategies: actions needed; include year action will be completed and who is responsible

Strategic Plan Development History:
- 2015 Strategic Planning Team: Jim Bright, Lance Eberle, Joy Harter, Jim Heinzen, Sara Laughlin; Facilitator: Michael Shermis
- Member Input during club assemblies in March 2015 and November 2015.
- Member survey October/November 2015
- Update for 2024 started in November 2023
- 2023-24 Strategic Planning Team: Ron Barnes, Traci Jovanovic, Alain Barker, Hannah Hirsch, Jeff Richardson; Facilitator: Michael Shermis
- Board approved 2/15/24; Club Assembly presentation 2/20/24

Outcomes	Objectives	Strategies	Responsibility	Year 1
1. Finance Bloomington Rotary is a stable, sustainable, and fiscally accountable organization committed to	A. Maintain and operate within a board-approved budget.	1. Draft budget. 2. Set a cash reserve and determine positive cash flow. 3. Review budget. 4. Approve budget.	Treasurer, Club Assistant, Board; Committee Chairs	Draft budget in May; set cash reserve/determine positive cash flow; review budget; approve-May Board meeting; approve budget at June Board meeting
	B. Review and revise fiscal policies and procedures.	1. Provide fiscal policies template 2. Draft fiscal policies and procedures 3. Review fiscal policies and procedures 4. Approve fiscal policies and procedures	Treasurer, Club Assistant, Board	Provide fiscal policies template; draft policies; review; approve

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Outcomes	Objectives	Strategies	Responsibility	Year 1
good stewardship of its finances and resources.	C. Produce an annual report, tax returns, and fulfill employer-filing requirements.	1. Gather information 2. Fill out forms 3. Submit returns	Treasurer, Club Assistant	Gather information; fill out forms; submit returns by filing deadline.
	D. Maintain RI Foundation at $100 per capita and 100% participation.	1. Invite all Club members not currently giving through Every Rotarian Every Year (EREY) to participate. 2. Report regularly to the club on impact of RI Foundation work.	Rotary Foundation Committee	Invite; report and trend out for y/y on a quarterly basis.

Outcomes	Objectives	Strategies	Responsibility	Year 1
2. Governance Bloomington Rotary has an ethical, and critically thinking board and members who share a long-term commitment for the mission/vision of the organization.	A. Increase transparency through revisions to board meeting reporting, elections, and Foundation reporting.	1. Report on actions/information from board meetings in *Roundabout*. 2. Provide candidate bio/experience in ballot for elections. Administer survey of club members to gauge if transparency is being met.	Board	
	B. Maintain and update bylaws and orientation manual.	1. Review bylaws with Board. Begin update process, if Board desires.	Board	Every three years (due up in 2025)
	C. Maintain four active leaders in the officers and/or committee participation at the District level.	1. Support district governor and assistant governor. 2. Participate in planning for district conference. 3. Underwrite registration costs to attend district conference for all new members (one time) or for Board members who financially need it.	Board	

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		4. Encourage members to attend district conference.		
	D. Maintain active connections to the other Bloomington clubs.	1. Continue to attend monthly meetings of area club president-elects, presidents, past presidents, convened by assistant governor. 2. Hold shared service activities, social opportunities, and weekly meeting programs.	President-elect, President, Past President	
	E. Attain Presidential Citation status.	1. Update every year; review mid year 2. Incorporate Presidential Citation goals in strategic plan and committee assignments. 3. Review progress in preparation for submitting report.	President Board	
	F. Assess Club every other year through a self-reflection survey.	1. Develop a survey (check in with District for examples), review with board, and send to Club 2. Share with Board and Committee Chairs.	Board	
	G. Assess the work of committees.	1. Have each committee chair provide a brief written report to the Board annually on their committee's major outcomes and challenges, if any. Committee Chairs should make a recommendation if the committee should continue, disband, or consider being revamped (with rationale, if other than "continue"). 2. Create protocol/process for disbanding committees. 3. Have an annual retreat for committee chairs facilitated by president.	President Board President	Annual

Outcomes	Objectives	Strategies	Responsibility	Year 1

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3. Development Bloomington Rotary supports itself through development activities that ensure we can provide funds to our foundations (Bloomington and Rotary International), our scholarships, and our selected charities.	A. Create a committee resource development plan in support of the club's community service, international service, and youth service activities.	1. Ask each committee to discuss their funding situation, what's available to them from the club, and whether they are fully leveraged.	President	
	B. Increase fundraising from current level of $8,500/year to $23,000/year by end of the planning period.	1. Co-sponsor Rotary Toast event and recruit sponsorship opportunities ($5,000) 2. Continue monthly "Happy Dollars." ($2,500—hyper and regular annually $1,500) 3. Secure a district grant every year. ($3,000) 4. Paul Harris ($10,000) 5. Develop a plan for corporate sponsorships linked to a community service or international service opportunities ($1,000) 6. Put more specific guidelines around scholarship and fundraising opportunities and better reporting from committees on what was raised and how it was spent 7. Do a quarterly business review to track results and better identify need.	Board	
	C. Increase per capita giving by 10% to Bloomington Rotary Foundation	1. Educate new members on giving opportunities. 2. Invite all not currently giving through quarterly dues to participate. 3. Give a presentation to the Club differentiating RI Foundation versus Bloomington Rotary Foundation. 4. Update application form to include information on giving with an opt-out option.	Board, Bloomington Rotary Foundation	

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Outcomes	Objectives	Strategies	Responsibility	Year 1
4. Club Service Bloomington Rotary has talented, inclusive, engaged membership.	A. Encourage membership that represents the professions and diversity of Monroe County.	1. Contact appropriate department in city government or other appropriate agency to get similar demographics for the City/County. 2. Review professional demographics of the Club. 3. Compare trends of our Club against City/County statistics as a baseline (with the attempt to be better than that) 4. Use data in board meetings to cultivate underrepresented groups. 5. Cultivate service professions and health/biotech companies.	Classification Committee; Membership Committee	Set up a monthly tracking on the DAC or in Box and review in Board meetings only quarterly.
	B. Continue to develop a more diverse membership that is reflective of Bloomington demographics.	1. Consider scholarships, fellowships, or sponsors to lower the cost of membership as needed for diverse populations (gender, age, and ethnicity). 2. Target IU staff but recognize challenge with time commitment with the goal of increasing university participation each year by 5% 3. Have all members invite prospects to attend luncheons with relevant programs and timely follow up (membership committee) for participation in club (20-30 a year)	Membership Committee; Classification Committee; Club Members	.
	C. Update and implement the onboarding and mentoring process.	1. Invite those who haven't done greeting, pledge/reflection or introducing guests to sign up. 2. Recognize and "applaud" new member efforts to remind all to participate by placing in agenda	President; Membership Committee	

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		3. Hold quarterly informal get-togethers of new members as part of onboarding-- leverage IMU, library and a member's home for variation of locations and times. 4. Develop a checklist to share with new members and sponsors outlining ways to get involved, things to know and do. 5. Develop an internal checklist to onboard new members for sponsors.		
	D. Complete annual committee signup process by June 30th with all of members committed to a committee.	1. Meet with current committee chairs/co-chairs in March and April to assess what is working and what needs improvement and confirm willingness to continue or invite new chairs/co-chairs. 2. In May and early June, announce committee sign-up opportunities to club during meeting and via Roundabout. 3. Provide a list with members. 4. Share committee signups with chairs/co-chairs in June; make adjustments as needed. 5. In June, follow-up with those not signed up, then announce rosters to chairs/co-chairs. 6. Invite new members to join a committee.	President-elect	April 1st for a list of people not on committees and April 30th people to have changed
	E. Increase fellowship and interaction among members by building relationships through frequent interactions.	1. Continue Rotary Happy Hours. 2. Continue socials – summer, fall, and holiday. 3. Survey Club for fellowship and networking opportunities.	Fellowship/ Family/Fun Committee	

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		4. Recruit volunteers to greet, introduce guests, and lead pledge and reflection at weekly meetings. 5. Schedule Happy Dollars as a way to know more about each other. 6. Have a family event about once a year (fall picnic site has a playground, advertise as a family event). 7. Continue to promote Lunch Buddies program 8. Plan quarterly Happy Hours and socials that include on specifically for families		
	F. At least 65% of active members attend weekly meetings.	1. Offer timely, interesting programs on a wide variety of topics. 2. Include at least four club assemblies each year. 3. Solicit membership for speaker/presentation interests	Program Committee	

Outcomes	Objectives	Strategies	Responsibility	Year 1
5. Community Awareness Bloomington Rotary members and the community are aware of the club's significant, positive impact on the community and the world.	A. Develop a comprehensive marketing and communications plan.	1. Complete a media/membership plan. 2. Combine PR and Roundabout Committees to form a new Strategic Communications Committee, with two sub-committees for Internal Communications and External Communications. 3. Develop an internship program with the Media School, enabling students to participate in our PR activity (writing, journalism, photo, and video). 4. Do a minority leaders award (based on our values: 4-Way Test)	PR Committee	

		5. Audit all our communication activity with the objective of synchronizing and strengthen our effectiveness and build community awareness.		
	B. Write and distribute a bi-monthly press release that goes to influencer's list (hey did you know the amazing things that Rotarians are doing in the service world; Rotary seen as a resource; talking about others; find an individual--make a job description for it).	1. Develop a segmented community contact list and keep media list updated. 2. Determine content for press releases/letters through board member idea submission. 3. Schedule releases/letters with local publications.	PR Committee	
	C. Hold story development session to help members refine their own Rotary stories.		PR Committee	
	D. Write and distribute weekly e-newsletter *Roundabout* to members.	1. Assign reporters to weekly meetings. 2. Edit content. 3. Email to members. 4. Post on Website.	Roundabout Committee, Club Assistant	
	E. Increase social media engagement by 20% a year.	1. Review Facebook, Instagram, and LinkedIn engagement (likes, number of responses, number of posts we produce each year, how many video segments we're able to produce) to determine level of increase. Do a weekly post in relevant social media outlets 2. Generate a constant stream of topics for posts 3. Assign writers for posts 4. Schedule posts in Facebook, Twitter, etc.	PR Committee	

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	F. Explore sponsorship opportunities.	1. Seek funding for external communication activity, including advertising and public radio underwriting.	PR Committee	
	G. Convene community dialogue on key issues of concern to our local community with face-to-face civic dialogue	1. Expand contacts with Sister City and Braver Angels. 2. Use Chamber networking list to provide opportunities.	PR Committee; Community Service Committee?	Bi-annually

Outcomes	Objectives	Strategies	Responsibility	Year 1
6. Community Service Bloomington Rotary's hands-on service opportunities make a visible impact on the community.	A. Develop a three-year community service plan that reflects a variety of volunteer options	1. Review the Rotary Areas of Focus and SCANS report to identify priority community needs. 2. Solicit ideas from club members 3. Engage community service committee members in setting the plan each year. 4. Ask each committee member to co-lead one project. 5. Include options for members from a variety of ages and abilities. 6. Identify potential partners for each activity.	Community Service Committee	
	B. Offer two one-time volunteer opportunities annually.	1. With committee, choose one option, based on the Rotary Areas of Focus, (Service Community Assessment of Needs (SCANS) research and feasibility, and the community service plan. 2. Use the district grant project selection process to select a second project that addresses the Rotary Areas of Focus, a SCANS priority need, and	Community Service Committee	

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		advances the community service plan.		
	C. Continue to support ongoing community service activities that have a meaningful positive impact.	1. Review the plan and the current annual schedule of community service projects. 2. Decide whether to continue or discontinue other ongoing projects (Teachers Warehouse supply drive and ongoing weekly volunteering, Salvation Army bellringing, Hoosier Hills Food Bank, Pete Ellis Drive clean-up, refugee resettlement, etc.)	Community Service Committee	
	D. Involve others to extend the impact of community service efforts.	1. Use Rotary's position as a group of diverse and engaged community leaders to convene interested parties to address priority community challenges. Make connections, leverage, and build relationships/ partnerships with groups that align with Rotary values, like Lake Monroe Water Fund, or in areas like affordable housing and education. 2. Invite partners for each activity (other Rotary clubs, Rotaract, Interact, other organizations, friends of Rotary). 3. Engage with Bloomington Rotary Foundation to coordinate expenditure of Toast proceeds for community service priorities, based on the three-year plan.	Community Service Committee	
	E. Increase awareness of and involvement in community service activities among club members and in the community.	1. Attend orientations and encourage new members to participate in community service activities. 2. Announce each volunteer opportunity at club meetings and list in Roundabout.	Community Service Committee	

		3. Recruit volunteers from club and partners. 4. Thank volunteers. 5. Take photos of Rotarians involved in activities. 6. Post photos and comments on the club Facebook page and website and forward to club president for announcement at meetings. 7. Share photos and comments with partners, district, and RI, as appropriate. 8. Encourage partners to include recognition of Rotary in their communications.		
	F. Annually evaluate and report volunteer opportunities to assess impact.	1. After every community service event, survey members about why they participated or did not and gather comments. 2. After every community service event, submit photos and project summary to the PR Committee. 3. Collect names and hours volunteered for all Rotary efforts and report to the club and to RI about percent of club members involved and number of hours contributed.	Community Service Committee	
	G. Collaborate with the Bloomington Rotary Foundation to endow the club's Scholarship program by raising $200,000 for the Foundation over the next 10 years.	1. Support the BRF in designing and implementing a fundraising campaign. 2. Include the Scholarship Committee in fundraising. 3. Invite the BRF to present financial status updates at a club board meeting once a year.	Bloomington Rotary Foundation; Scholarship Committee; Board	

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		4. Keep club members informed about the progress of the campaign through announcements, in collaboration with BRF updates during meetings, four times/year.		
	H. Work with the Bloomington Rotary Foundation to raise the visibility of the Foundation within the club membership by presenting information during meetings about the impact of the Foundation four times a year.	1. Each quarter, a BRF officer will present an update about the BRF's work. 2. BRF president facilitates the BRF annual meeting at a club meeting in April every year.	Bloomington Rotary Foundation; Board	

Outcomes	Objectives	Strategies	Responsibility	Year 1
7. International Service Bloomington Rotary has a sustainable impact on global peace and understanding.	A. Mirror the international nature of the club's community by making spending on international projects, or domestic projects with an international component, a part of each year's budgeting and spending.	1. Finalize what we plan to do for a $10,000 to $20,000, one year or two-year project (IU School of Medicine AMPATH program) in Western Kenya. 2. Plan and execute a kickoff event during one of the club's Tuesday meetings in April, 2024. Raise funds through 5/31/24 from club members, other clubs, and anyone else who might give us money. 3. Based on fundraising performance, finalize project financial details by 6/30/2024. 4. Include $5,000 of the club's annual budget each year dedicated to international projects or domestic projects with an international component. This would include spending on our club's overseas	Board; International Service Committee`	By 2/14

		projects, spending for another club's overseas projects, spending in support of the Rotary International Youth Exchange and local spending for "international activities" such as refugee support, community events and other germane activities. 5. Provide the human resources and raise supplemental funds as needed to accomplish Item 1. Note: Some of this work will be done in support of other club committees.		
	B. Explore the merits and mechanics of a large, club initiated, international project involving a Rotary Global Grant.	1. Read, ask questions, communicate with all pertinent and/or potential players including Rotary International, District 6580, other clubs in District 6580, sister city clubs and other clubs with a vested interest in the AMPATH project. 2. Decide to either move forward with this project, abandon this project, or table this project	International Service Committee	By 6/30/24

Outcomes	Objectives	Strategies	Responsibility	Year 1
8. Vocational Service Members apply the four-way test in their lives and use their professional skills on behalf of Rotary.	A. Provide opportunities to learn about members' skills and experience.	1. Highlight a member of the month that would show a member's life experiences and feature it in the Roundabout. 2. Partner with Rotaract and Interact to do a Mentor Match that offers mentors and discussion opportunities.	Vocational Service Committee	
	B. Hold four programs presented by members each year.	1. Call out at beginning of new year for signups. 2. Direct asks from VSC members.	Vocational Service Committee	

	C. Encourage Rotarians to display and use the Four-Way Test in their professional lives.	1. Continue to recite Four-Way Test at end of each luncheon. 2. Explore other ways to facilitate display of the Four-Way Test in professional situations, e.g., screensavers, lapel ribbons, Rotary post-it notes, add to back of business cards, etc.	Vocational Service Committee	

Outcomes	Objectives	Strategies	Responsibility	Year 1
9. Youth Service Responsible, caring youth are involved in service with the guidance and support of Bloomington Rotary.	A. Increase number of students, up to 10, to go to RYLA (diversity reflective of Bloomington demographics).	1. Involve students who have attended in recruiting and making presentations to Interacts, local youth-serving agencies, including Boys & Girls Clubs, Banneker Center, Wonderlab, etc. 2. Communicate with school guidance counselors, Rotary members in all three Bloomington clubs, and other sources of non-traditional participants. 3. Announce in local media: HT, WFIU, radio stations. 4. Add "reunion" in spring for attendees. 5. Explore participation by younger kids (middle school). Currently we don't have the bandwidth, but if something changed, we could investigate this. 6. Develop video promotional materials (use what exists).	Youth Service Committee	
	B. Send invitations to Interact/Rotaract members to increase participation in Rotary-sponsored events and activities by 50% (from 4 to 6 a year). Currently we	1. Communicate with Interact sponsors and student leaders and Rotaract leaders at least two months in advance of event.	Youth Service Committee	

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	don't have the bandwidth, but if something changed, we could investigate this.	2. Invite participation in planning whenever possible, to ensure that participation is meaningful. 3. Seek assistance from Interact and Rotaract in publicizing, recruiting volunteers, and fundraising.		
	C. Plan one community joint project with Interact/Rotaract.	1. Work with Community Service Committee to identify project.	Youth Service Committee	
	D. Continue four high school scholarships and three Ivy Tech scholarships and develop a reporting mechanism.	1. Announce availability of scholarships to high school counselors, Rotary members, and local media; select winners and notify all applicants; invite winners to Rotary meeting to make short presentations and receive checks. 2. Coordinate presentation of Ivy Tech scholarship winners at meeting.	Scholarship Committee	
	E. Increase participation of high school students in Four-Way Test speech contest by 100%.	1. Work with Interact to promote and encourage participation. 2. Determine other schools that don't have Interact and approach them.	Youth Service Committee	
	F. Be a host club for one inbound and one outbound Rotary Youth Exchange student every year. (The outbound maybe aspirational.)	1. Establish a Bloomington Rotary Youth Exchange Task Force. 2. Work together with other Bloomington Clubs to enhance Youth Exchange Program and students' experience. 3. Promote ongoing education about what's involved to be a host family and the benefits of Youth Exchange. 4. Choose host families. 5. Determine how to sustain the program with ongoing leadership.	Youth Services Committee; Bloomington Youth Exchange Task Force	

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