

Rotary Club of Estero

Strategic Plan 2021-2022

Overview

This plan is developed in the midst of the COVID pandemic which has had and will continue to have an overwhelming impact on club status and operations. The greatest impact has been on membership and meetings. Other areas impacted, but to a lesser extent, have been fundraising and club leadership. Not being able to predict just how long this pandemic period will last, one cannot predict how long it will be, or even if, we will be able to return to some semblance of the former “normal”. Thus, this plan will consider the continued operation under the pandemic cloud and the process and actions to be undertaken as we emerge from this period of unprecedented restrictions and consequent changes.

The vision of our club is to be vibrant and growing; to be a priority in members weekly activities; to be known and highly regarded by the community; to be welcoming and inclusive; to be “younger”; and to provide every member with the opportunity to fulfill their passion to serve others, to learn from one another and to develop lasting friendships and business relationships.

Membership

In the past 12 months the club has lost 10 members from a roster of 52. The membership of the Estero club is very skewed toward an older population, so losses due to illness and deaths are to be expected. However, only 2 of the 10 are in this category. Three of the losses were due to business issues caused by the pandemic (corporate memberships), two were physical moves out of the area and one was a transfer to another club. Two others had waning interest and thus no desire to stay under the pandemic environment. One of the most disappointing factors in these losses was that it included five female members who were among our most active Rotarians.

Engaging and recruiting new members during this pandemic period has been daunting. Many are not willing to venture into an unfamiliar meeting space. And though some guests have attended a meeting on Zoom, we have not found it to be an interaction and engaging medium that builds relationships. Thus, our short-term plan will continue to be focused on member retention. That entails the following actions.

1. Frequently discuss the benefits of being a Rotarian
2. Make all members familiar with the content and use of DACdb and Rotary Club Central
3. Include Rotary educational topics in our speaker agenda and a frequent Rotary moment
4. Highlight member recognition in the meetings such as presentation of PHF pins, new RIF donors and visible community service activities and
 - Recognize exceptional performance at the June initiation social by making awards for Rotarian of the Year and Rising Star
 - Make use of club “points” to advance member PHF recognition levels as they donate to RIF through EREY quarterly contributions and larger one-time and PHS annual donations
5. Identify the passion of each member for service and align that with the appropriate committee
6. Frequently emphasize the club goals and encourage member support
7. Emphasize the club’s project successes and benefits provided to the community
8. Continue to provide service projects that keep members involved

9. Participate in Chamber of Commerce meetings and events to help young professional grow their business networks in addition to “Rotary Means Business” participation
10. Continue with social events to grow relationships among the members and add some FUN
11. Be sure the meeting speaker topics are new and educational
12. Have at least one speaker each month be a member providing their “life story” and addressing the topic of why they are a Rotarian
13. Maintain all pandemic protocols to encourage members to return to and feel safe at meetings and social events
14. Have a meeting [president and new member sponsor] with a new member after about 3 months to assess their satisfaction with being a Rotarian and our club
15. Maintain and periodically update/reproduce a membership roster booklet to assure members have contact information for all their fellow club members. This will include all the seasonal residents [known as “Snowtarians”] who regularly attend our meetings and participate in our activities and fundraising projects
16. Continue with hybrid meetings so all members have the opportunity to participate until they are comfortable meeting outside the home

Once the club has reached the point where most members are attending meetings in-person and it appears that the general population is venturing out, we will likely discontinue using Zoom. It is expected at the point that members can reengage in the practice of inviting friends, neighbors and business acquaintances to meetings. We expect that our club will be inviting and demonstrate such value that some of those will attend several meetings and seriously consider whether Rotary is the right organization to provide them with opportunities to fulfill and/or enhance some of the desires for their life. To do so, it is our obligation to continue the actions described in points 1 to 12 above and in addition –

1. Be sure to introduce each visitor to the meeting
2. Ask the visitor to spend a few minutes telling us about their self and how they think Rotary can be of value to their goals and aspirations
3. Invite guests who have visited the club to attend the next social event
4. Increase our brand, mission and impact in the community by building awareness with an enhanced PR and social media presence
5. Donate a book to the school library to thank each guest and have them sign it [we currently do this for speakers]
6. Conduct new member introduction seminars and invite guests who have attended several meetings to participate
7. Increase efforts to have speakers continue to attend meetings and consider membership
8. Provide increased motivation for members to invite friends, neighbors and business associates by waiving the next quarterly dues after their guest joins the club

New Member Obligations/Expectations

New members will be expected to carry out and complete the following activities in their first six months of membership. These duties and tasks are designed to help in meeting all their fellow Rotarians, identifying their passions for areas of service and learning the scope of Rotary’s mission and programs.

- Serve 2 times as the meeting greeter
- Give a classification talk at a club meeting
- Bring at least one guest [potential new member] to a meeting or social event

- Join at least one committee
- Active participation in all fundraising events
- Serve 2 times as the 50/50 jackpot raffle handler
- Attend RLI session #1

Diversity, Equity and Inclusion

We recognize the value and importance of diversity, equity and inclusion in club membership. As was pointed out previously, we lost five female members and these members were among our most active and energetic members. The value of DEI for a healthy and vibrant club is abundantly clear. Thus, inviting members of diverse demographic populations will continue to be strongly encouraged. Nevertheless, we do not plan to make this a “numbers” activity. The overriding objective will be to engage and retain those who are true Rotarians that recognize and embrace “Service Above Self”.

We also recognize that an essential aspect of developing diversity within the club is educating our members on DEI. Through the use of meeting speakers, use of on-line educational presentations and club discussions we will strive to have members become more cognizant of how their behavior, words and attitudes affect members of minority populations and would make individuals feel uncomfortable and unwelcomed in the club. And it is equally as important for members to appreciate that these factors are just as relevant and impactful in our relationship and behavior toward others outside of the Rotary environment. Our goal is to create an environment where all members:

- don’t expect a member of a minority population to speak for their entire gender, ethnic, socio-economic or sexual preference group
- assure that all are included in planning and participation of projects and social events
- encourage consideration of the needs and circumstances of affected populations in proposing grants
- consider how they may support potential members where economic limitations make meeting the financial obligations of membership daunting

Club Weekly Meetings

We will continue with the hybrid meeting format until most of the members are comfortable attending in-person meetings. At present this is expected to be the case for the balance of 2021. For 2022 and beyond the meeting format and content will focus on the following.

1. Attendance at weekly meetings is a priority and one of the best 1.5 hours of the week
2. Meetings have more fun activities such as sports pools, guessing games and Rotary “Theme of the Month” poster competition
3. Meeting speakers are new and educational
4. Members have a chance to participate, not just be listeners
 - Rotate responsibility for leading pledge and delivering the invocation
5. Members will be encouraged to “mix it up” in seating so cliques are not formed
6. Members will be recognized for achievements and celebratory happenings
7. Guests will always be seated at full tables with members
8. Periodic meeting field trips and evening social events will replace some regular weekly meetings to enable spouses/partners to be engaged with the members and to break from the routine

Leadership

Leadership has been an issue. One might call it “The Curse of the President-elect”. In the past six years we have experienced the unfortunate departure from the club of four President-elects prior to their assuming the office of president. This often in the midst of or after the PETS training program. These resignations from the club were due to business related circumstances and/or relocations. So, while not an issue with a change of mind or trepidation over becoming president, the situation does produce the difficult circumstance of identify and preparing a replacement. In some circumstances we have been able to induce a former president to reassume the role and in other cases to find a new person to step in at the last minute. But there could become a time where no one will step in. Then What?

The planned approach is to mimic the District Governor’s process by establishing a two-year succession plan with a president-elect and a president-elect nominee. Then, should a resignation occur, we would have members who are known to be committed to serving, would have had the opportunity to become familiar with the roles and responsibilities, and could move up their year or partial year of service if needed.

We also plan to duplicate this process for the secretarial position. In general, our treasurers have been willing to serve multiple successive years as this is a position where we desire stability and familiarity with managing the financial records. After two to three years of service, we will identify a new individual to serve as “co-treasurer” in order to enable an extended period of training before assuming the position in the following year.

Another area related to leadership where improvement is needed is in the functioning of committees. While committee heads have usually been in place, the participation of other members on committees has been lacking. And we recognize that being on committees is a good stepping stone to learning more about Rotary and developing leadership skills. Thus, we will seek an approach to get every member to serve on a committee by doing the following.

1. Emphasize committees at weekly meetings by having the committee head speak about the committee purpose, activities and plans.
2. Use item 1 to help members identify their passion for service as a Rotarian
3. Continually encourage members to join a committee
4. Assure that new members are committed to join a committee upon introduction

We will grow members understanding of Rotary and its mission, as well as to enhance leadership skills and the willingness to serve as a leader, by encouraging every member to attend RLI. We expect every club president to be an RLI graduate.

Fundraising

Active fundraising activities are essential to enabling the club to fulfill its mission. Our due’s structure is adequate to enable this income to maintain the operational budget. Thus, we strive to have other income generated in our meetings such as the 50/50 drawing, fines, happy/sad and anniversary/birthday celebration donations applied to our charitable foundation in order to support our community giving. However, our annual goal is to generate a minimum of \$30,000 to enable our foundation giving budget. This requires several major fundraising projects that focus on income provided by the community at large, not primarily club members. We will continue with our previous successful projects as listed in the

following, but will continue to identify and try new ideas. The goal is to add two more activities that produce at least a \$5,000 profit over the next 3 years.

1. Golf Tournament at a local club with 120 to 130 participants held each September with income provided by golf fees, business sponsors, raffles and silent auction of donated items
2. Light Up Estero – a December Holiday celebration for the Estero community held at the community park with income provided by attendee donations, wreath raffle and business sponsors; advertised use for the funds is for Estero High scholarship grants

We recognize that our purview must also extend beyond just our local community and our own club activities and projects. We must also take a broader Rotary community and a global view. Accordingly, our club foundation will also apply a portion of its annual budgeted funds to support Rotary International and other club activities and projects. We will seek out and continue to collaborate with other area clubs with common charitable interests by leading and/or supporting multi-club DDG projects.

From the global perspective we are committed to making annual contributions to RIF [~\$4,000] and Polio Plus [~\$2,000] as well as other Rotary International Foundation sponsored programs such as Gift of Life and Global Grants, especially those focused on water/sanitation and education. Additionally, we will continue to have our Foundation Chair highlight the opportunity and value of members considering a Legacy contribution by becoming a Benefactor and/or a member of the Bequest Society.

Community Presence

We recognize the importance of having a high level of visibility in the community. This has value beyond only developing membership. It is important to have a perception that the community would miss us if we did not exist. This visibility and value to the community will be maintained with the following actions.

1. Maintain social media presence
2. Retain a close relationship with Village of Estero governance
3. Have Rotary wheel placed on each Village of Estero main-roads entrance monument
4. Maintain a large number of grants to other community charitable organizations whose activities and mission match our priorities for health, poverty remission, child welfare and environmental protection and preservation
5. Maintain a presence in the community schools with Interact and RotaKids clubs, and the support of Literacy projects and scholarships for Estero High graduates

Estero Rotary Club 2020-2021 Board of Directors

Michael [Bob] Pinnel – president

Gary Israel – director

Jennifer Kudray – secretary

Lisa Canning – director

Robert Boudreau – treasurer

Caitlin O'Reilly - director

Richard Hart – immediate past president

Thomas Patricca – director

Laura Ackerman – director

Sally Smith – director

Henry Bird – director

Kevin Morris – director