



Lewisville Morning Rotary Strategic Planning

Dates: March 30, 2022 April 6, 2022 May 4, 2022 June 1, 2022

OVERVIEW

- Committees were organized during the strategic planning sessions to address key needs within the club and to lay out a 5 year strategic plan where possible
- All members of Lewisville Morning Rotary were invited to participate
- Proposals from all committees and the full strategic planning group are documented in the following sections for review
- Sessions facilitated by Prior DG Gene Davenport

CLUB NEEDS

Need A - Short Term Priority Goals Around Meetings and Dues

- Volunteers: Bob Troyer (Lead), Ray Bowens, John Pokorny
- Tasks: Identify recommendations for venue, type, day, time, food and member dues for 22-23 RY.
Part II - Short term priority goal to identify committed leadership team of officers and directors working with president beginning with 22-23 Rotary year.

Need B - Membership Growth and Engagement

Volunteers: Deanna Perkins (Co-Lead), Marilyn Pokorny (Co-Lead), Jeff Lighton, Maria Smithwick (non-member, CES Liaison)

- Tasks: Set goal for membership and Identify specific steps, action items, and practices the club will institute including timelines and accountability that are needed achieve the goal.

CLUB NEEDS, CONT'D

Need C - Flag Program

- Volunteers: John Pokorny (Lead), Jeff Lighton, Bob Troyer
- Tasks: Set goal for flag subscriptions and Identify specific steps, action items and practices the club will institute including timelines and accountability that are needed achieve the goal.

Need D - Community Service

- Volunteers: Mark Smith (Lead), Todd Taylor, Jeff Lighton
- Tasks: Committee will perform community needs analysis for service projects within the local community and will propose options to address the needs based on available resources and budget.



Short Term Priority Goals Around Meetings and Dues

MEETING LOCATION AND TIME

Proposal:

Champion...Bob Troyer. Timeline (starting with July 7, 2022, meeting

For the 2022-2023 Rotary Year it is proposed that we meet at Main Street Café in Old Town Lewisville.

Meeting time is 7:15 AM on Thursday mornings, weeks 1 through 4. We continue to plan an evening social or service project on week 5.

Location Details:

- **No cost**
- **We have full access to the back room of the restaurant**
- **Food is available if desired (at member expense)**
- **Storage will be provided for Rotary equipment, banners, flags**
- **Will allow us to install a Rotary Plaque stating our name, meeting time etc.**



MEMBER DUES

Proposal:

Champion: Bob Troyer Timeline: BOD approval of plan on June 14th meeting, implement with July/Aug/Sept Dues Invoice.

Two types of membership opportunity

- **Corporate Membership**.....Dues Cost, \$816 annually invoiced at \$204/quarter. Covers the cost of one member employed by the business, and up to 3 additional employees can participate in club projects and meetings. In addition to membership, corporate members also will be recognized on LMR Website, Club Newsletters and Flag Newsletters.
- **Standard Membership**.....Dues Cost \$528 annually invoiced at \$132/quarter. Members that achieve 75 participation points in the previous quarter will receive a \$30/quarter discount for quarterly dues of \$102. Members paying less than \$102 for the spring quarter of 2022 will be grandfathered for 12 months.
 - Participation points awarded as follows:
 - 5 points for each meeting attended during previous quarter
 - 5 points for each event registration or volunteer registration during previous quarter
 - 25 Club Designated Points for each new member sponsored that has achieved their Blue Badge
 - 5 points if member serves a club officer
 - 5 points for each committee member actively serves on
 - 3 points for each district designation including Bequeath Society, Sustaining Member, PHF, new PHF+ in current year, PHS in current year, Past District Officer, Past President, Area Governor Recognition in current year.

CLUB OFFICERS FOR 2022-2023

Champion: Bob Troyer

Timetable, seek BOD Approval at June 14 BOD. Announce at June 16 Regular meeting and implement at pass-the-gavel.

Proposal:

President:	Bob Troyer
President Elect:	TBD
Secretary:	Deanna Perkins
Treasurer:	Mark Smith
Immediate Past Pres.:	Traci Petteway
Flag Chair:	Jeff Lighton
Foundation Chair:	John Pokorny
Membership Chair:	Marilyn Pokorny
Public Image:	John Pokorny(Internum until new candidate is identified)



Membership Growth and Engagement

MEMBERSHIP GOALS

Proposal:

Year	Active Member Goal
Current	13
2022 - 2023	21 members (+8)
2023 - 2024	32 members (+11)

MEMBERSHIP ACTION PLAN

Proposal:

Implement the following actions over the next 3 years and reevaluate the success of each item frequently to determine if they should be adjusted or continued. Asking a new person to come to a meeting is great, and encouraging them to join us is important, but that person will join when they feel a connection and passion to our purpose. The idea of talking, visiting, sending a note, giving them information about our club is key to keep the interest and engagement alive.

1st year (2022-23)

- Have a greeter at meetings to welcome guests
- Members provide testimonials about being a Rotarian in meetings
- Hold an Open House sometime in August
- Collect information cards on guests

MEMBERSHIP ACTION PLAN, CONT'D

2nd year (2023-24)

- Hold a membership activity monthly
- High profile meeting (city manager, doctor, teacher, etc.)
- Have an event with 2-3 other Rotary groups in area
- Go to other 501c3 groups and tell them about Rotary
- Decal for car windows and other advertising

3rd year (2024-25)

- Have members give talk of “Why they joined Rotary?” or “What Rotary means to them”
- Recruitment team for the month. Bring to our meeting a possible new member. Work as a group of 2-3
- Develop welcome letter.



Flag Program

FLAG SUBSCRIPTION GOALS

Proposal:

Year	Flag Subscription Goal
Current	216+
2022 - 2023	325
2023 - 2024	450
2024 – 2025	600

FLAG GROWTH ACTION PLAN

Proposal:

Implement the following actions in 2022 and 2023. Continue to look for more opportunities.

Assigned Champion: Jeff Lighton

Time Table: Implement target strategy starting June of each year

1. Update flag website and payment system – by Bob Troyer and John Pokorny
 1. Promote incentive program of one additional holiday for each neighbor or friend recommended to subscribe
2. Advertise at public and city events
3. Target specific neighborhoods
 1. 2022-2023 Target Old Town Neighborhood with flyers, door hangers, presence at neighborhood events & canvassing of neighborhood by members and scouts
 2. 2023-2024 Target Old Town North Neighborhood with flyers, door hangers, presence at neighborhood events & canvassing of neighborhood by members and scouts
 3. 2024-2025 Target Valley and Valley North Neighborhood with flyers, door hangers, presence at neighborhood events & canvassing of neighborhood by members and scouts
4. Distribute door hangers at 10 neighboring residences of current subscribers
5. Phone calls to past subscribers
6. Continue flag newsletter and communications to current subscribers



Community Service Planning

KEY COMMUNITY SERVICE FOCUS AREAS

AREAS OF NEED IN THE COMMUNITY

(INFORMAL NEEDS ASSESSMENT)

- **FOOD INSECURITY**
- **YOUTH DEVELOPMENT AND SUPPORT**
- **COMMUNITY ENRICHMENT AND UNITY**
- **MENTAL HEALTH**
- **VETERAN ISSUES AND HOMELESSNESS**

COMMUNITY SERVICE GOALS

Proposal:

USE OUR CLUB RESOURCES TO IMPROVE OUR COMMUNITY BY SUPPORTING PROJECTS IN AS MANY OF THE KEY FOCUS AREAS AS POSSIBLE

INCREASE OUR COMMUNITY SERVICE PROJECTS IN SCALE AND SIZE EACH YEAR AS BUDGET AND PEOPLE RESOURCES PERMIT

BE FLEXIBLE IN RECOGNIZING AND RESPONDING TO NEW OPPORTUNITIES AND NEW IDEAS DURING THE YEAR TO ADDRESS COMMUNITY NEEDS

2022-2023 PROJECTS PROPOSAL

Proposed Community Service Projects - 2022/2023

Project	Focus Area	Club Budget Requirements (Est)	Resource Requirements	# of Events
Volunteer CCA Food Pantry, Heart of the City, Salvation Army, LovePacs, Veteran's Produce	Food Insecurity in Community	\$0	2 to 8 people	4
Food Drives/Collections for Food Banks including School Pantries	Food Insecurity in Community	\$0 to \$100 for signage and boxes	2+ people	1
Provide financial support for Food Organizations	Food Insecurity in Community	\$500		1
Build up Interact Clubs at Hebron and/or the Colony HS	Youth Development and Support	\$0 - \$100 (club support)	1 coordinator, other members as needed	1
Dictionary program	Youth Development and Support	\$2000 - \$3000 (In addition to Grant)	3 to 6 people	1
Volunteer at Central Elementary events	Youth Development and Support	\$0	1 to 4 people	3
Peace Pole at Hebron HS	Youth Development and Support	\$300	1 to 4 people	1
Bike awards at Central Elementary	Youth Development and Support	\$1600 - \$1800	2 to 4 people	1
Conduct 4 Way Test Speech Contest	Youth Development and Support	\$400	1 to 4 people	1
Financial support for LEF scholarships	Youth Development and Support	\$1,000	1	1
RYLA	Youth Development and Support	\$250	Coordinator, Driver	1
Student of the Month Recognition	Youth Development and Support	\$50	Coordinator	9
Salvation Army Bell Ringing	Community Enrichment and Unity	\$0	4 to 6	1
Breakfast with Santa	Community Enrichment and Unity	\$1,500	8 to 12 people	1
CCA 5K Pancake Breakfast	Community Enrichment and Unity	\$200	4 to 8 people	1
Total Commitment		\$7,500 - \$9,200		28

Add-On Projects to Consider as Resources Allow

Continue support for Household Hazardous Waste	Environment	\$0	TBD
Financial Support and volunteer for KLB projects	Environment	TBD	TBD
Blood Drives	Community Enrichment and Unity	\$100 (advertising/other expenses)	TBD
Other non-profit financial grants	Mental Health	\$200 - \$3000	TBD
CCA Toy Giveaway	Community Enrichment and Unity	\$0	2-4 people
First responder support – recognitions, meals, etc.	Community Enrichment and Unity	\$500 per event	TBD
Veteran Support	Veteran Issues/Homelessness	TBD	TBD

*Does not include fundraising events such as CCA Parking, Ebd Polio, and Flag Program

Proposal:
Beginning the 2022/2023 Rotary year, include plans in the club budget for these community service projects. Plan to complete at least 1 community service project a month as resources and budget constraints allow.

The following pages show a tentative project calendar for the upcoming year. More projects will be added as plans are confirmed.

July

2022

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SAT/SUN
27 June	28	29	30	1 July	2/3
4 July 4 th ! Flags Deployed	5	6	7 First Meeting at Main St. Cafe	8	9/10
11	12	13	14	15	16/17 Food Pantry Opportunity
18	19	20	21 Hebron Student of the Month Recognition	22	23/24
25	26	27	28	29	30/31
1 August	2	3	4	5	6/7

August

2022

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SAT/SUN
1 August	2	3	4	5	6/7
8 Start Dictionary Project Planning – Apply Grant	9	10	11	12	13/14
15	16	17	18 Hebron Student of the Month Recognition	19	20/21 Food Pantry Opportunity
22	23	24	25	26	27/28
29	30	31	1 Sept	2	3/4
5	6	7	8	9	10/11

September

2022

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SAT/SUN
29 August	30	31	1 September Start Flag Deployment for Labor and Patriot's Day	2	3/4
5 Labor Day – Flags Deployed	6	7	8	9	10/11 Patriot Day – Flags deployed
12	13	14	15 Hebron Student of the Month Recognition	16	17/18 Food Pantry Opportunity
19	20	21	22	23 CCA Parking Fundraiser	24/25 CCA 5K Pancake Breakfast CCA Parking Fundraiser
26	27	28	29	30	1/2 October
3	4	5	6	7	8/9

October

2022

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SAT/SUN
26 September	27	28	29	30	1/2 October
3	4	5	6 Start Flag Deployment for Columbus Day	7	8/9
10 Columbus Day Holiday – Flags deployed	11	12	13	14	15/16 Food Pantry Opportunity
17	18	19	20 Hebron Student of the Month Recognition	21	22/23
24	25	26	27	28	29/30
31	1 November	2	3	4	5/6

November

2022

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SAT/SUN
31 October	1 November	2	3 Start Flag Deployment for Veteran's Day	4	5/6
7	8	9	10	11 Veteran's Day – Flags Deployed	12/13 Food Pantry Opportunity
14	15	16	17 Hebron Student of the Month Recognition	18	19/20
21	22	23	24 THANKSGIVING!	25	26/27 Salvation Army Bell Ringing
28	29	30	1 December	2	3/4
5	6	7	8	9	10/11

December

2022

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SAT/SUN
28 November	29	30	1 December	2	3/4 Breakfast With Santa / Holiday Stroll
5	6	7	8	9	10/11
12	13	14	15 Hebron Student of the Month Recognition	16	17/18 Food Pantry Opportunity
19	20	21	22	23	24/25
26	27	28	29	30	31/1 January
2	3	4	5	6	7/8

January

2023

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SAT/SUN
27 December	28	29	30	31	31/1 January New Year's Day
2	3	4	5	6	7/8
9	10	11	12 Start Flag Deployment for MLK Day	13	14/15
16 MLK Day Holiday – Flags Deployed	17	18	19 Hebron Student of the Month Recognition	20	21/22 Dictionary Prep and Labeling
23	24	25	26	27	28/29
30	31	1	2	3	4/5

February

2023

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SAT/SUN
	31 January	1	2	3	4/5
6 Dictionary Delivery	7 Dictionary Delivery	8 Dictionary Delivery	9 Dictionary Delivery	10 Dictionary Delivery	11/12
13	14	15	16 Hebron Student of the Month Recognition Start Deploying Flags for President's Day	17	18/19 Food Pantry Opportunity
20 Start Recruiting for 4-Way Test Speech Contest President's Day Holiday – Flags Deployed	21	22	23	24	25/26
27	28	1 March			

March

2023

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SAT/SUN
27 February	28 February	1	2	3	4/5
6	7	8	9	10	11/12
13	14	15	16 Hebron Student of the Month Recognition	17	18/19 Food Pantry Opportunity
20	21	22	23	24	25/26
27	28	29	30 4-Way Speech Contest (Club)	31	April 1/2
3	4	5	6	7	8/9

April

2023

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SAT/SUN
27 March	28	29	30	31	1/2 April
3 Start RYLA Recruiting	4	5	6	7	8/9
10	11	12	13 Hebron Student of the Month Recognition	14	15/16 Food Pantry Opportunity
17	18	19	20	21	22/23
24	25	26	27	28	29/30
1	2	3	4	5	6/7

May

2023

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SAT/SUN
1 May	2	3	4	5	6/7
8	9	10	11 Start Flag Deployment for Peace Officer's Memorial Day	12	13/14
15 Central Elementary Bike Awards? Peace Officer's Memorial Day – Flags Deployed	16 Central Elementary Bike Awards?	17 Central Elementary Bike Awards?	18 Central Elementary Bike Awards? Hebron Student of the Month Recognition	19 Central Elementary Bike Awards?	20/21 Food Pantry Opportunity
22	23	24	25 Start Flag Deployment for Memorial Day	26	27/28
29 Memorial Day – Flags Deployed	30	31	1 June	2	3
4	5	6	7	8	9/10

June

2023

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SAT/SUN
29 May	30	31	1 June	2	3/4
5	6	7	8	9	10/11 RYLA?
12	13	14 Flag Day Holiday – Flags Deployed	15	16	17/18 RYLA? Food Pantry Opportunity
19	20	21	22	23	24/25
26	27	28	29 Start Flag Deployment for July 4th	30	1/2
3	4	5	6	7	8/9