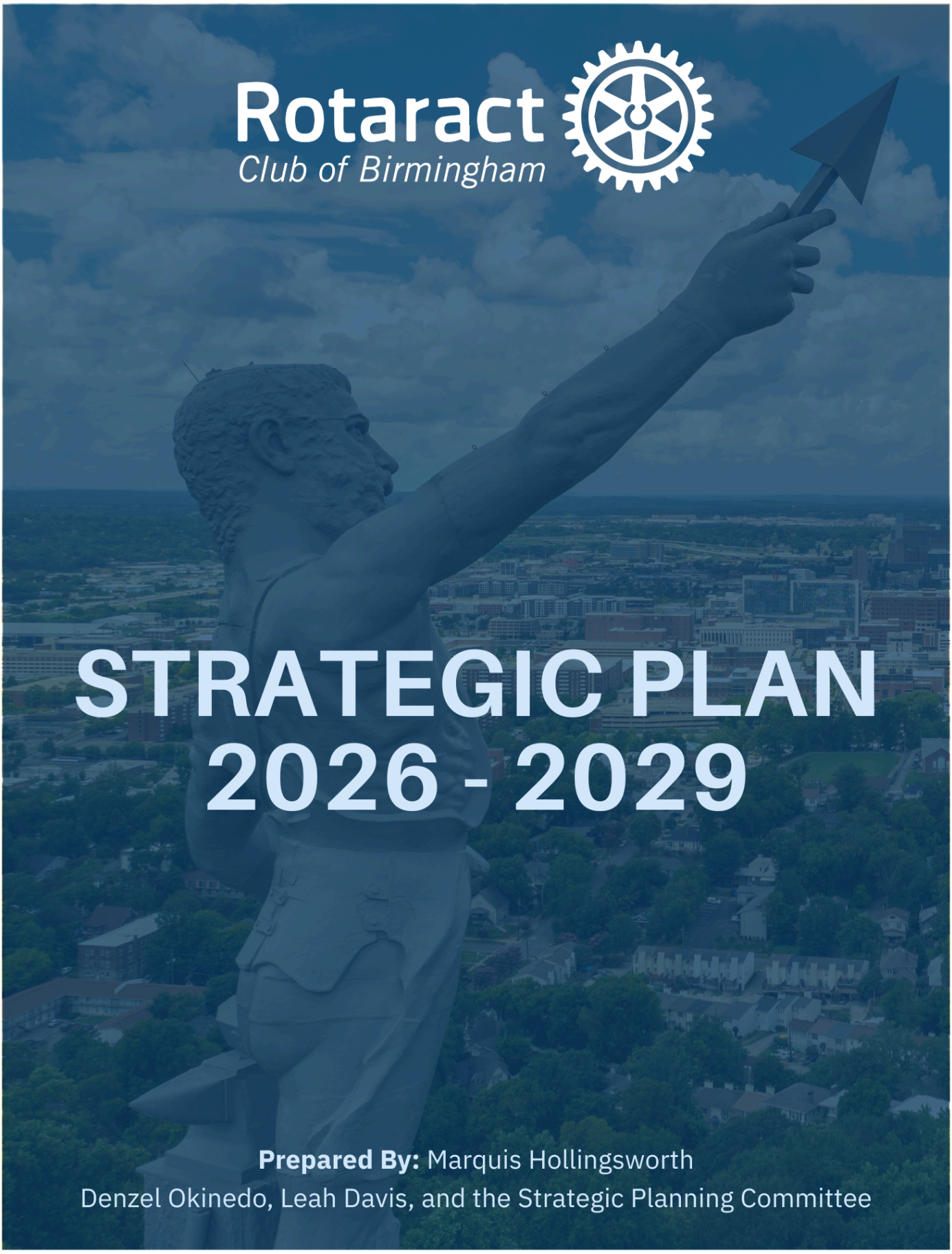


Rotaract
Club of Birmingham

STRATEGIC PLAN 2026 - 2029

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Foreword

Rotaract has always been about more than the work we do. It is about the people we meet and who we become because of them.

When we started this, we did not want to write another plan that ends up in a folder no one opens. We wanted to listen first. Over the past several months, members were generous and honest with us about what they love here and where they want the club to grow. That feedback shaped every page that follows.

One thing came through louder than anything else: relationships are the heart of this club. The friendships, the mentorship, the professional connections, and the feeling of belonging are what keep people here long after their first meeting. This plan is our commitment to protecting that and building on it for every member.

The goals ahead are ambitious, but none of them are ours alone. They came from you, and they will only come to life through you. Our hope is that this roadmap gives the next several years of leadership a clear place to start and the freedom to keep shaping what comes next.

Thank you for helping us imagine it. We cannot wait to build, together.

Leah Davis & Denzel Okinedo
Strategic Planning Co-Chairs
2025-2026

Strategic Planning Committee 2025 - 2026

- **Leader**: Marquis Hollingsworth
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Executive Summary

This report outlines the Strategic Planning Committee's recommended action plan for the next three years. These recommendations are grounded in feedback collected through the Pulse Check Survey, Listening Labs, and follow-up discussions with members.

Across all inputs, one core insight consistently emerged: **relationships (social, professional, and civic) are the primary drivers of member satisfaction and long-term commitment to Rotaract.**

While members value the organization's programming, feedback highlighted gaps in how those experiences translate into sustained engagement, clear development pathways, and a consistent sense of belonging.

Key themes included:

- A need for more intentional connection and relationship-building
- Gaps in onboarding, mentorship, and long-term development pathways
- Lack of clarity and transparency in leadership processes
- Inconsistent systems for communication and knowledge sharing
- Mixed perceptions of dues relative to value and a desire for financial transparency

The opportunity ahead is to refine how the organization operates so that the value members already experience is more consistent, accessible, and sustainable across the full membership lifecycle.

Strategic Goals

These goals are grounded directly in member feedback and reflect the outcomes this plan is designed to achieve.

1. Development Across the Member Lifecycle

Provide clear, continuous, and accessible opportunities for professional and personal growth at every stage of membership, ensuring that development does not end after onboarding or early leadership programs and that members remain engaged throughout their full Rotaract experience.

Member Insights: "Learn" category scored lowest amongst focus areas in Pulse Check Survey; Listening Labs referenced stronger pre-COVID professional development programming, confusion around what comes after LDP, Board Fellows, etc.

2. Intentional Connection

Design events, programs, and member experiences in a way that intentionally builds strong social, professional, and civic relationships, rather than relying on informal networks or individual effort to create connection.

Member Insights: Pulse Check Survey showed "Relationships" as the clear driver of satisfaction and long-term commitment to the club; Listening Labs revealed many people joined for the network more than programming, how people feel when leaving event matters, and concern for maintaining relationships when people age out

3. Transparent Leadership & Shared Ownership

Create leadership structures that are clear, accessible, and sustainable by defining expectations, improving communication around leadership pathways, and ensuring members feel prepared and supported when stepping into leadership roles.

Member Insights: Listening Labs repeatedly emphasized that slating and leadership selection process feels unclear and nontransparent; Members also cited board burnout and post-board disengagement as a deterrent to future leadership

4. Sustainable Systems & Infrastructure

Strengthen the internal systems that support the organization, including communication tools, documentation, processes, and knowledge transfer, so that leadership transitions do not disrupt continuity and the club can operate consistently from year to year.

Member Insights: Listening Labs identified clear "data management system problem"; there was confusion around slack vs website communication, lack of board meeting minutes, no central location for bylaws or historical documents

5. Financial Stability & Stewardship

Manage finances in a way that is transparent, intentional, and sustainable by clearly communicating how resources are used, planning proactively for future needs, and ensuring that financial decisions align with the value provided to members.

Member Insights: Pulse Check Survey flagged dues and finances as one of the most requested areas for change with members expressing that ROI is not clear; Listening Labs raised challenges for entrepreneurs under the current dues structure, and emphasized the need for revenue forecasting and improved fundraising and sponsorship engagement

How This Plan is Organized: Recommendations are organized into four initiative areas:

- Member Development & Experience
- Leadership & Governance
- Systems & Infrastructure
- Financial Sustainability

Each section includes context, strategic focus, and detailed actions.

Year 1 intentionally emphasizes more concrete operational priorities as the Rotaract Club strengthens foundational systems, structure, and continuity. Years 2 and 3 are designed to provide strategic direction and momentum while still allowing flexibility for future leadership teams to shape implementation based on evolving needs, opportunities, and member feedback.

As we move from listening to action, this plan is guided by a strategic framework grounded in member feedback and 2026-2027 presidential priorities. With development and connection intentionally placed first as the primary driver for retention, engagement, and long-term growth. This framework provides a clear path for translating strategy into focused, actionable steps over the next three years.

MEMBER DEVELOPMENT & EXPERIENCE

While Rotaract offers strong programming, the member experience is not consistently structured to support long-term engagement. Members lack clear pathways for involvement, particularly beyond early participation, and connection is not always intentionally designed.

This plan prioritizes development as an ongoing and structured experience. Making it clear, continuous, and accessible so members can grow and stay engaged at every stage of their time in the club.

Strategic Alignment
Goal 1: Development Across the Member Lifecycle
Goal 2: Intentional Connection

Focus

- Strengthen onboarding and integration
- Create structured engagement pathways
- Extend development beyond early involvement

Action 1: Establish Small Groups Based on Professional Classifications		
Overview	**Timeline**	**Success Metric**
Establish small groups based on professional classifications aligned with Rotary member classifications	Year 1	40% member participation in Y1
How It Will Work: Members will be grouped by professional classification into small cohorts that serve as a structured pathway into the Club and a consistent entry point for relationship-building. These groups will be encouraged to meet and connect periodically, creating ongoing opportunities for engagement. Because the cohorts are aligned with Rotary's classification system, they also create stronger pathways for connection and networking with Rotary members beyond current touchpoints.		

Action 2: Implement Mentor Matching with Rotary Members		
Overview	**Timeline**	**Success Metric**
Expand mentorship and professional relationship-building opportunities between Rotaract and Rotary	Year 2	30% member participation in first year of implementation

How It Will Work:

Final implementation and structure would be developed collaboratively with Rotary Clubs in the region, allowing flexibility to shape mentorship and networking opportunities based on member needs and participation. Identifying members willing to serve as mentors to Rotaractors within their respective professions. From there, we would determine together the most effective structure, whether through formal mentor assignments, curated introductions, or joint social opportunities that allow for more organic relationship-building.

Action 3: Maintain Updated Member Classifications		
Overview	**Timeline**	**Success Metric**
Keep member classifications updated in the membership portal[1]	Year 1	60% of members complete their member profile by Y1

How It Will Work:

Members will update their contact information and professional classifications during onboarding and dues renewal.

Action 4: Establish Participation Benchmarks for Leadership & Programs		
Overview	**Timeline**	**Success Metric**
Define membership participation benchmarks tied to eligibility for board leadership and professional development programming such as LDP and Board Fellows	Year 1	Benchmarks implemented

How It Will Work:

Participation benchmarks will be established for members interested in pursuing Board leadership roles or participating in programs such as LDP or Board Fellows, similar to the expectations set for individuals applying to join the Club. While these benchmarks will not serve as strict eligibility requirements, they will be considered in the selection process, with preference given to candidates who demonstrate consistent participation.

This approach is intended to create and reinforce clear leadership pathways within the Club while also encouraging ongoing engagement and participation.

[1] See Systems & Infrastructure: Action 1- Membership Portal

Action 5: Assign Members to Committees		
Overview	**Timeline**	**Success Metric**
Assign all members to committees during dues renewal	Year 1	30% of members attend 1 or more committee meetings in Y1

How It Will Work:

All members will be assigned to a committee to create clear pathways for participation and engagement within the Club. By grouping members based on their skills or interests, this structure also creates opportunities for informal affinity groups to emerge organically. It provides Vice Presidents and Committee Chairs with a broader, more visible pool of members to engage for support, addressing current gaps in understanding member skill sets.

While committee assignment will be standard for all members, the goal is to encourage meaningful participation beyond placement alone.

Action 6: Establish "Rotaract Hubs" via Recurring Meetup Locations		
Overview	**Timeline**	**Success Metric**
Create more consistent and accessible opportunities for informal connection and relationship-building across the city	Year 1/2	2 meet-up locations established

How It Will Work:

Explore recurring informal gathering spaces and connection opportunities that encourage low-pressure, relationship-driven engagement among members. Establish these socials by identifying several coffee shops and/or bars and locations across the city as recurring meetup spots where members can expect to see other Rotaract members on a regular basis, creating consistent gathering points rather than individually scheduled events.

This creates more opportunities for flexible, low-pressure connection opportunities.

LEADERSHIP & GOVERNANCE

Members expressed a lack of clarity and transparency in leadership processes, along with concerns about burnout and continuity between terms. This plan demystifies leadership by defining pathways, improving continuity between terms, and creating experiences that better support members as they step into and grow through leadership.

Strategic Alignment
Goal 3: Transparent Leadership & Shared Ownership
Goal 4: Sustainable Systems & Infrastructure

Focus
- Increase visibility into leadership
- Expand participation opportunities
- Strengthen transitions and accountability

Action 1: Increase Board Transparency		
Overview	**Timeline**	**Success Metric**
Share board agendas, minutes, and meeting access	Year 1	Board meeting minutes shared in the membership portal[2] for 90% of board meetings Y1
How It Will Work: The Board will be expected to document and share meeting minutes with the full membership and to promote board meetings with the same visibility and consistency as other member-only events, actively encouraging attendance. This approach is intended to foster a more open and accessible culture, where leadership and decision-making are visible, understood, and not siloed within the Board.		

Action 2: Expand Member Participation in Governance		
Overview	**Timeline**	**Success Metric**
Continue expanding opportunities for member participation, transparency, and shared ownership through recurring feedback forums	Year 1/2	Have 1 off-site business meeting in Y1
How It Will Work:		

[2] See Systems & Infrastructure: Action 1- Membership Portal

Explore additional structures and recurring opportunities that increase member visibility into Club operations and encourage more active participation in organizational discussions and feedback processes. These meetings/opportunities could function similarly to chapter meetings in other organizations, where dues-paying members are expected to attend, receive more detailed updates on Club business, and have opportunities to provide feedback, ask questions, and, where appropriate, participate in decision-making. This structure is intended to create a more active and engaged membership, shifting away from primarily one-way report-outs toward a more participatory model where members can exercise their voice as stakeholders in the organization.

Possible business meetings model could largely function as extended or integrated board meetings, with 3 out of 4 meetings incorporated into regularly scheduled board meetings. At least 1 out of 4 meetings should be held in person (with a virtual option), ideally as an off-site luncheon in place of a traditional speaker event.

Listening Labs would remain a formal tool for Club leadership to gather member feedback, used on an ongoing basis as needed rather than only during strategic planning cycles. For example, topics or challenges surfaced during business meetings may warrant deeper discussion through Listening Labs, reinforcing their role as a consistent and intentional mechanism for member input.

Action 3: Strengthen Leadership Transitions and Accountability		
Overview	**Timeline**	**Success Metric**
Strengthen leadership continuity through more intentional transition practices and development processes	Year 2	100% of outgoing VPs complete transition documents; annual VP review completed for all positions

How It Will Work:

Continue strengthening continuity between board terms through intentional transition practices, shared knowledge transfer, and structured leadership reflection opportunities. Outgoing Board members will be required to complete some form of transition documentation prior to the selection of a new Board, strengthening our accountability measures, ensuring knowledge transfer, and continuity from year to year.

Introduce a leadership reflection and feedback process as a standard practice, designed to increase clarity, support accountability, and strengthen continuity across leadership terms. This would create structured opportunities for leaders to pause, reflect, receive feedback, and continue growing in their roles as well as professionally.

While leadership teams currently set their own cadence for check-ins, this new approach establishes a more consistent and transparent rhythm with the Club. The goal is not to remove

individuals from their roles, but to provide support, identify areas for growth, and ensure our leaders are set up for success throughout their term and their professional future.

SYSTEMS & INFRASTRUCTURE

Members identified inconsistent communication and lack of centralized information as barriers to engagement. With this plan we're strengthening systems and infrastructure to better support how Rotaract operates today. By centralizing information it puts us in a better position to improve communication and preserve institutional knowledge so that leadership isn't starting from close to scratch year over year.

Strategic Alignment
Goal 4: Sustainable Systems & Infrastructure

Focus
- Centralize information
- Improve communication
- Strengthen documentation

Action 1: Expand and Promote Member Portal on Website		
Overview	**Timeline**	**Success Metric**
Use member portal on the website as central hub for documents and resources	Year 1	All core documents uploaded in Y1

How It Will Work:

Expand the functionality and accessibility of the member portal to serve as the central hub for Club information and resources. Members should be able to access key documents and organizational materials, including bylaws, board meeting minutes, luncheon slide decks, the strategic plan, leadership role descriptions, application links, a member directory, a suggestion box, and a clear sitemap, directly through the portal.

The goal is for the member portal to function as the primary "source of truth" for the Club, while Slack shifts to a supporting role as a communication and reminder tool that directs members back to the portal rather than serving as the main repository for information.

This approach enables members to independently find answers to common questions—such as event details, application timelines, or meeting outcomes, by logging into their portal, reducing reliance on scattered communication channels and improving overall clarity and accessibility.

Action 2: Maintain Shared Organizational Records

Overview	Timeline	Success Metric
Require VPs and Chairs to maintain shared documentation	Year 1	100% roles maintain updated folders in shared drive
How It Will Work: Standardized folders and expectations for record-keeping for VPs and Chairs in Google Drive		

FINANCIAL SUSTAINABILITY

Members expressed concern about dues, value, and financial transparency, alongside a need for sustainable funding strategies. This plan prioritizes financial sustainability through clear, proactive, and transparent stewardship: aligning dues, fundraising, and sponsorship strategies with the value provided to members and the long-term needs of the club, all to protect and properly invest in the member experience both personally and professionally.

Strategic Alignment
Goal 5: Financial Sustainability & Stewardship

Focus
- Improve transparency
- Align value with cost
- Expand funding sources

Action 1: Establish Sponsored Dues Fund		
Overview	**Timeline**	**Success Metric**
Explore sponsorship and partnership models that expand member support and strengthen long-term financial sustainability	Year 2/3	Secure at least 3 dues sponsors and fund 10% of memberships through sponsorship
How It Will Work: Develop and evaluate sponsorship approaches that create additional pathways for supporting member participation and expanding sustainable funding opportunities. • Create a sponsorship toolkit to encourage corporate sponsors to cover membership dues as a corporate social responsibility (CSR) initiative advancing civic engagement • Establish clear expectations for recognition dues sponsors can expect from the Club • Equip dues sponsors with messaging and other assets to tout/celebrate their sponsorship across their platforms		

Action 2: Engage Rotary Clubs in Dues Support		
Overview	**Timeline**	**Success Metric**
Secure Rotary contributions to dues fund	Year 1/2	At least 1 Rotary club contributes annually to sponsorship fund
How It Will Work: Engage local Rotary clubs to contribute to an established sponsorship fund for Rotaract dues, separate from Foundation fundraising efforts. In addition to club-wide contributions, explore opportunities for targeted support aligned with professional classifications. For example, Rotary members in HR contributing to a fund that supports the dues of emerging HR professionals in Rotaract. This approach not only expands funding sources but also strengthens professional pipelines and connections between Rotary and Rotaract members.		

Action 3: Launch Alumni Capital Campaign		
Overview	**Timeline**	**Success Metric**
Develop long-term alumni engagement and fundraising strategies that support the sustainability and future growth of the Club	Year 1/2/3	Raise minimum of $5,000 from alumni within campaign period
How It Will Work: Explore targeted engagement and outreach strategies that strengthen alumni connection to the Club while creating long-term fundraising opportunities.		

Action 4: Create Financial Flow Chart		
Overview	**Timeline**	**Success Metric**
Develop visual explanation of club vs foundation finances	Year 1	Financial flow chart completed and presented to membership annually
How It Will Work: Create and share clear, accessible financial visuals.		

FINAL WORD

One of my main goals with this process was to approach strategic planning differently than we may have in the past. Not simply creating a document, but creating intentional space for members to help shape the future of the club together.

Over the last several months, members gave honest feedback, challenged assumptions/traditions, shared ideas, and helped identify both the strengths of Rotaract and our opportunities for growth. This plan is stronger because of that openness, participation, and shared ownership.

While no strategic plan can predict every future challenge or opportunity, I believe this framework gives us the beginning of a strong roadmap and a shared understanding of what we want the member experience to look and feel like moving forward.

I'm deeply grateful to everyone who contributed throughout this process and a special shoutout to Leah, Denzel, and the strategic planning dream team for all their hard work. I'm ecstatic about what comes next but more than anything, I'm confident in the people who will help bring this plan to life and continue impacting the future of this club and community for years to come.

Marquis Hollingsworth
President-Elect
2025-2026