



Strategic Plan
July 2018 – June 2021

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Georgia Rotary Scholars Program



Vision:

To develop leaders who promote understanding and peace around the world.

Mission:

GRSP provides scholarships to advance cultural understanding and social experiences through friendship, develops potential global leaders, and expands the ideals of Rotary around the world.

Values:

Diversity of people, cultures, beliefs and perspectives

Leadership development locally, nationally and globally

Integrity and the highest of ethical standards

Service above self

Fellowship among all

Respect of different perspectives

Peace and understanding among people and nations

GRSP Strategic Plan Overview

Goal 1: Explore Changes to Program Cost Structure

Strategies

- 1.1 Investigate opportunities to maximize program investment
- 1.2 Determine generation of new funds
- 1.3 Review endowment strategy

Goal 2: Build Organizational Structure & Operational Capacity

Strategies

- 2.1 Enhance current staffing levels
- 2.2 Define roles & responsibilities for all internal stakeholders
- 2.3 Update technology and cybersecurity

Goal 3: Expand Marketing & Communications

Strategies

- 3.1 Rebrand GRSP
- 3.2 Redesign website
- 3.3 Develop a comprehensive marketing plan
- 3.4 Develop a social media strategy
- 3.5 Develop an Alumni Relations Program

Goal 4: Improve Training to All Stakeholders

Strategies

- 4.1 Expand staff training
- 4.2 Expand Trustee training
- 4.3 Expand student training
- 4.4 Expand club and host family training

Goal 5: Ensure Diverse, Qualified Student Engagement

Strategies

- 5.1 Increase student diversity
- 5.2 Enhance understanding of student expectations
- 5.3 Pilot program development

Goal 6: Enhance Student and Club Experience

Strategies

- 6.1 Enhance student weekends
- 6.2 Revisit annual program evaluation
- 6.3 Increase Rotary and club engagement

Goal 1: Explore Changes to Program Cost Structure

Strategy 1.1: Investigate opportunities to maximize program investment

Task	Responsible Party	Target Date
<ol style="list-style-type: none"> 1. Committee to evaluate options for reducing costs, including: <ol style="list-style-type: none"> a. Reducing scholarships (number of students or schools) b. Transferring some cost to students c. Consider Pilot Program d. Consider cost savings at each school (meal plans, etc.) e. Consider strategic partnerships with schools for decreasing fees f. Consider changes to corporate/VISA structure g. Consider other options 	Terry Gordon & Mike Sweigart (co-chairs)	Committee identified by end of August.

Goal 1: Explore Changes to Program Cost Structure

Strategy 1.2: Determine generation of new funds

Task	Responsible Party	Target Date
<ol style="list-style-type: none"> 1. Determine budget required for Executive Director to take on additional fundraising responsibilities and reorganize office structure (See Goal 2) 	Terry Gordon & Mike Sweigart (co-chairs)	TBD once committee has been appointed.
<ol style="list-style-type: none"> 2. Consider increasing endowment through charitable giving 		
<ol style="list-style-type: none"> 3. Reengineer budget to support new business/operational model 		

Goal 1: Explore Changes to Program Cost Structure

Strategy 1.3: Review endowment strategy

Task	Responsible Party	Target Date
<ol style="list-style-type: none"> 1. Look at responsibilities, terms, and authority of Endowment Trustees 	Terry Gordon & Mike Sweigart (co-chairs) – ensure that Committee includes Endowment Trustees	TBD once committee has been appointed.
<ol style="list-style-type: none"> 2. Revisit endowment strategy periodically according to economic conditions 		
<ol style="list-style-type: none"> 3. Consider implications of GDPR on endowment 		

Goal 2: Build Organizational Structure and Operational Capacity

Strategy 2.1: Enhance current staffing levels

Task	Responsible Party	Target Date
1. Create proposed job description for Executive Director, including fundraising and marketing responsibilities	Lorri Christopher & Bill Smith (co-chairs), including Lynn Clarke, Paige Havens, and Jim Drake	Complete by end of September 2018
2. Clarify proposed job descriptions for two existing staff positions in light of Executive Director position. Ensure separation of duties with cross-training		
3. Identify funding for proposed Executive Director		
4. Implement annual performance measure expectations and reviews	Executive Committee	TBD

Goal 2: Build Organizational Structure and Operational Capacity

Strategy 2.2: Define roles and responsibilities for all internal stakeholders

Task	Responsible Party	Target Date
1. Review bylaws regarding term limits for officers (recommend not more than 3 consecutive one year terms, rather than 5 consecutive)	Lorri Christopher & Bill Smith (co-chairs), including Lynn Clarke, Paige Havens, and Jim Drake	Complete by end of December 2018
2. Create job descriptions for Trustees, detailing specific expectations regarding student contact, marketing to clubs, etc. (or update bylaws to reflect these expectations)		
3. Review bylaws to ensure committee structure meets current needs of organization.		
4. Update Host Family Handbook and expectations. (see strategy 4.4)		
5. Update job descriptions & expectations for all staff (see strategy 2.1)		
6. Update student expectations contract (see strategy 5.2)		

Goal 2: Build Organizational Structure & Operational Capacity

Strategy 2.3: Update technology and cybersecurity

Task	Responsible Party	Target Date
1. Determine technology and software needs for GRSP staff	Lorri Christopher & Bill Smith (co-chairs), including Lynn Clarke, Paige Havens, and Jim Drake	Complete by end of October 2018
2. Establish secure procedures for distribution of student information to Trustees and Clubs		
3. Explore technology & cybersecurity needs for online application process		

Goal 3: Expand Marketing & Communications

Strategy 3.1: Rebrand GRSP

Task	Responsible Party	Target Date
1. Determine name change	Paige Havens & Lynn Clarke (co-chairs), including George Siggins	July 2018
2. Develop presentation on name/strategic plan/mission/vision/values for use by Trustees		End of September 2018
3. Design new logo		
4. Update all branded materials (letterhead, cards, brochures, etc.		
5. Develop brand standards		
6. Consider registering/copyrighting new mark		

Goal 3: Expand Marketing & Communications

Strategy 3.2: Redesign website

Task	Responsible Party	Target Date
1. Define goals and objectives, operational needs, & audiences	Paige Havens & Lynn Clarke (co-chairs), including George Siggins	Phased in with completion by July 2019
2. Wireframe/outline – to include calendar, fundraising portal, mobile friendly		
3. Redesign		
4. Ensure security measures are in place		
5. Test & launch		

Goal 3: Expand Marketing & Communications

Strategy 3.3: Develop comprehensive marketing and communications plan

Task	Responsible Party	Target Date
1. Form Marketing/Communications Committee	Paige Havens & Lynn Clarke (co-chairs), including George Siggins	September 2018
2. Develop common calendar		Complete by October 2018
3. Define marketing tools needed by reviewing current marketing pieces and meeting with committees		
4. Clearly define audiences and key messaging		
5. Define execution strategies & tactics and compile into Marketing and Communications Plan. (include marketing to broader spectrum of countries – see strategy 5.1)		
6. Develop online access to templates and materials		
7. Develop marketing request form for new needs		
8. Evaluate annually		

Goal 3: Expand Marketing & Communications

Strategy 3.4: Develop social media strategy

Task	Responsible Party	Target Date
1. Define audiences	Paige Havens & Lynn Clarke (co-chairs), including George Siggins	Complete by end of November 2018
2. Determine platforms (Facebook, snapchat, newsletter, Twitter, YouTube, etc.)		
3. Design pages		
4. Content development		
5. Ad campaigns/Audience development		
6. Explore RI partnerships/collaborations		

Goal 3: Expand Marketing & Communications

Strategy 3.5: Develop an Alumni Relations Program

Task	Responsible Party	Target Date
1. Compile a database of alumni	Paige Havens & Lynn Clarke (co-chairs), including George Siggins	Complete by end of March 2019
2. Create alumni annual giving campaign		
3. Create marketing/communication channels for alumni		
4. Capture alumni testimonials		
5. Create new alumni engagement opportunities annually		

Goal 4: Improve Training to All Stakeholders

Strategy 4.1: Expand staff training

Task	Responsible Party	Target Date
1. Ensure staff is trained on technology, including excel, website, social media, database	Rob Kellner, Al Hoembrook, & Pam Lightsey (co-chairs)	Phase in to complete by Spring 2019
2. Ensure staff are trained in DACDB		
3. Staff to keep current on university/college admissions policies and procedures		
4. Ensure staff receive training in presentation skills/powerpoint to create and execute high quality presentations about GRSP		
5. Staff to visit Rotary clubs on occasion		

Goal 4: Improve Training to All Stakeholders

Strategy 4.2: Expand Trustee training

Task	Responsible Party	Target Date
1. Implement training specifically for new Trustees at summer meeting. Provide packet of information, including check list of Trustee roles & responsibilities (see strategy 2.2.), student expectations, host family information, student tax information, etc.	Rob Kellner, Al Hoembrook, & Pam Lightsey (co-chairs)	Summer 2018 & Summer 2019, ongoing
2. Provide training for existing Trustees on new information/data		Ongoing
3. Create incentive program for Trustees to earn points for an award at district conference		Conclave 2019

Goal 4: Improve Training to All Stakeholders

Strategy 4.3: Expand student training

Task	Responsible Party	Target Date
1. Provide online training (prior to Conclave) - be certain to emphasize potential scholarship taxation	Rob Kellner, Al Hoembrook, & Pam Lightsey (co-chairs)	Complete by Summer 2019
2. Reconsider current structure of Conclave. Rotate speakers and conduct smaller sessions to hold attention		
3. Develop training committee and regularly review training		
4. Develop incentive program for students to earn awards at district conference		

Goal 4: Improve Training to All Stakeholders

Strategy 4.4: Expand club and host family training

Task	Responsible Party	Target Date
1. Update Host Family Handbook. (see strategy 2.2)	Rob Kellner, Al Hoembrook, & Pam Lightsey (co-chairs)	Complete by late Spring 2019
2. Provide online tools (handbook, training, video) to support club & host family recruitment and training, including: <ul style="list-style-type: none"> • Student selection process • Host family expectations • Student expectations • Meeting/weekend schedules & details • Anticipated Costs • Contacts – student, college, GRSP • Cultural appropriateness 		
3. Provide training at Conclave, District Assembly, & Summer Meeting		
4. Consider incentive program for host families		

Goal 5: Ensure Diverse, Qualified Student Engagement

Strategy 5.1: Increase Student Diversity

Task	Responsible Party	Target Date
1. Market to a broader selection of countries (see goal 3.3.5)	Ian Bond & Bill Strickland (co-chairs), including George Siggins	Conclave 2018
2. Limit number of students per country		
3. Encourage wider selection of students by clubs		
4. Develop schedule/list of process for application and selection to ensure timely submission of SAT scores, etc.		

Goal 5: Ensure Diverse, Qualified Student Engagement

Strategy 5.2: Clarify expectations for students entering program

Task	Responsible Party	Target Date
1. Update student contract to clearly define expectations and policies. (see also strategy 2.2)	Ian Bond & Bill Strickland (co-chairs), including George Siggins	Complete by January 2019
2. Ensure students read and sign contract before arriving to US		
3. Review student expectations at Conclave (see strategy 4.3)		
4. Review application, particularly regarding psychological history		

Goal 5: Ensure Diverse, Qualified Student Engagement

Strategy 5.3: Pilot program development

Task	Responsible Party	Target Date
1. Identify pilot clubs and postsecondary educational institutions to become pilot sites	Ian Bond & Bill Strickland (co-chairs), including George Siggins	Groundwork by end of December 2019; Implement in 2020
2. Develop plan to find/interview students		
3. Evaluate ability to meet program mission through pilot program		
4.		

Goal 6: Enhance Student and Club Experience

Strategy 6.1: Enhance student weekends

Task	Responsible Party	Target Date
1. Incorporate service project into each weekend	Bill St. Clair, George Siggins, & Al Myers (co- chairs)	Phase in to be complete by end of December 2019
2. Incorporate a leadership development component in each weekend		
3. Alternate host clubs to increase club participation		
4. Students to participate in district conference service projects		

Goal 6: Enhance Student and Club Experience

Strategy 6.2: Improve annual program evaluation

Task	Responsible Party	Completion Date
1. Redesign student evaluation - Consider online format	Bill St. Clair, George Siggins, & Al Myers (co- chairs)	Complete by end of December 2018
2. Implement host family evaluation (annual)		
3. Implement club evaluation (annual)		
4. Identify how evaluation results will be analyzed and shared		

Goal 6: Enhance Student and Club Experience

Strategy 6.3: Increase Rotary and club engagement

Task	Responsible Party	Completion Date
1. Rotate clubs hosting weekends	Bill St. Clair, George Siggins, & Al Myers (co- chairs)	Complete plan by December 2018 and present for 2019 year
2. Host clubs include students in all activities		
3. Use colleges no more than 45 minutes from host club, whenever possible		
4. Students accrue points for service, Rotary attendance, GRSP weekends, etc.		