



**St. James Service Club**

*Dedicated to Giving*

# ST. JAMES SERVICE CLUB STRATEGIC PLAN

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## Executive Summary

The St. James Service Club, Inc. (SJSC) developed a three-year Strategic Plan to support the two pillars that underlie how we deliver our mission: fundraising and volunteering. Short term and advancing goals were created based on the results of a survey conducted in April, 2020 of our membership and the community at large. We view our strategic goals through five distinct lenses: members of SJSC, residents of St. James, local business leaders, community leaders, local nonprofits and the individuals they serve in Brunswick County. The plan will be reviewed annually and revised as necessary.

## Vision and Mission Statement

### Mission Statement

The St. James Service Club, Inc. is a nonprofit corporation dedicated to identifying and supporting the needs of our communities through volunteer participation and fundraising.

### Vision Statement

The St. James Service Club will be a recognized leader in identifying and meeting the needs of the local community. By working through its own organization, and with other nonprofits, we will strive to change the course of the future and improve the quality of life for those in need.

### Objective

The St. James Service Club is organized exclusively for charitable purposes, including the contribution of funds and services to organizations under Section 501(c)(3) of the Internal Revenue Code. No part of the net earnings of the Service Club shall in any way benefit or be distributed to its membership, officers or other private persons other than to refund any expenses incurred for fundraising purposes or other Service Club purposes.

## Values

To achieve our mission, we are guided by the following principles:

- To create an atmosphere where property owners can connect through SJSC to each other and to other organizations where they can share experiences and volunteer to help others
- To provide a fiscally responsible organization focused on providing fundraising and service programs that meet our mission
- To support the community through directed philanthropy

- To keep the “job” fun and engaging
- To ensure adherence to the principles of integrity, honesty, respect, transparency, accountability, teamwork, caring stewardship and responsiveness

## Elevator Pitch

Using the acronym SVU, the SJSC has developed the following Elevator Pitch that will be presented to the SJSC leadership team as a guide for how to introduce themselves and discuss the mission of the SJSC.

(S) I am a member of the **St. James Service Club**

(V) We are **volunteers** who partner with nonprofits to change the lives of people in need in Brunswick County

(U) We are **unique** because we not only have a membership of over 400 volunteers providing services to the community, but we’ve also raised more than \$1.8M since 1997. Last year alone, we donated more than \$131,000 to nonprofits who serve the community.

## Campaigning the Cause

### Target Audience

- Members of SJSC
- Residents of St. James
- Brunswick County residents, businesses, nonprofits and community leaders

### What Message

- Our organization’s “Dedicated to Giving” logo and message: time, talent and treasures
- Two pillars of our organization: fundraising and volunteering
- Who we serve: SJSC has identified lower income families in Brunswick County as its main beneficiary. The focus of our activity is to raise funds and volunteer in support of organizations working directly with this community.
- Thanks to our dues paying members, 100% of our net fundraising dollars goes directly into the community where it is most needed
- Encourage our leadership team to state our “elevator pitch” to the community at large when introducing themselves and our work
- Advertise our business and nonprofit partnerships

## What Mode

- Tagline on all published documents
- Website
  - Educate residents on volunteer opportunities “Beyond St. James” on our website
  - Create landing pages for key fundraising campaigns
  - PayPal for donating and purchasing online
- Welcome Receptions
- Recognition program for volunteers and long-standing members
- Nonprofit Fair
- General Membership meetings
- Print and social media outlets
- Surveys
- Focus Groups
- Promote our work in *What’s Up?*, *This Week*, *Cat Tales*, *Port Pilot*, *St. James Living* and *Star News*

## When and Where

- Media
  - Keep communicating our message to all print and virtual outlets
  - Send email blasts as reminders to members
- Sponsor
  - Visit businesses to highlight our work and attain sponsorships
  - Develop sponsorship packets to give to business
  - Send thank you notes to donors after they’ve given
  - Website recognition of sponsors
  - Track sponsorships: who, what, when and how much
- General Membership Meetings
  - Use monthly meetings to educate and inform our membership and guests
  - Recognize volunteers at meetings who go above and beyond
  - Recognize long-standing members
- Nonprofits
  - Use SJSC Liaisons to develop strong relationships with nonprofits (see Goal #3)

## Goals/Action Items/Performance Indicators/Personnel

The St. James Service Club’s 3-year strategic plan includes both short-term goals and advancing goals. Short term goals are expected to be completed within the first year and advancing goals

will be completed by the end of the 3-year plan. In some cases, the advancing goals contain both short term and long term action items. Goals will be re-evaluated each year and modified as necessary.

## Short Term Goals

### 1. Promote greater transparency of SJSC's grant process and fundraising

- Action Items
  - Announce and publicize the grant recipients in September to members and general public
    - Publicize the recipients selected for the current fiscal year's fundraising events using a variety of media (website, newsletter, SJ Living Magazine, General Membership meetings)
  - Publicize how the grants support the work of the nonprofits via testimonials or a video with appropriate testimonials on the SJSC website
  - Provide more financial information on website and current and historical grant distributions
  - Post the final distribution of grant funds on the website at the conclusion of the fiscal year
  - President's Annual Report
  - Large poster graphs with historical grant distributions
  - Conduct a survey in May, 2021 requesting feedback from members and the community
- Performance Indicators
  - Website information, and all publicity/marketing documents
  - Analysis of a membership survey
  - Number of visits to financial section of website
  - Mid-year Executive Committee Review
  - Annual Report
  - Positive feedback on May, 2021 survey
- Personnel
  - Board of Directors, Community Organizations Chair, Fundraising Chair, Service Programs Chair, Communications and Publicity Chair

### 2. Develop a realistic and effective fundraising calendar that takes Covid-19 into consideration

- Action Items
  - Limit the number of fundraising events to no more than six events per fiscal year

- Require the fundraising event calendar to:
  - Balance volunteer's time commitments
  - Consider the limits of the St. James community's financial resources
  - Address the challenges of natural disasters/pandemics when they occur
- Conduct a survey in May, 2021 requesting feedback from members and the community
- Performance Indicators
  - A 2020-2021 fundraising event calendar with no more than six fundraising events that also addresses natural disasters/pandemics if they occur
  - Final Event Report will reflect the volunteer's perspective of time commitment manageability
  - Survey results from event attendees
  - Mid-year Executive Committee review
  - Annual Report
  - Positive feedback on May, 2021 survey
- Personnel
  - First Vice President, Fundraising Chair, Event Committee Chairs

### 3. Identify service project opportunities that support SJSC's mission for volunteer participation and service to others

- Action Items
  - Develop the liaison position description and recruit liaisons for each nonprofit to serve as a link between the nonprofit and SJSC
  - Reach out to local nonprofits to identify direct service volunteer opportunities
    - "Done in a Day" group activities
    - Urgent needs expressed by the nonprofit
  - Promote direct service opportunities to St. James community on website, blasts, meetings and other media
  - Conduct a survey in May, 2021 requesting feedback from members and the community
- Performance Indicators
  - Number of opportunities in this fiscal year
  - Mid-year Executive Committee review
  - Annual Report
  - Positive Feedback on May, 2021 survey
- Personnel
  - First Vice President, Service Programs Chair, Service Programs Project Chairs



#### 4. Build Leadership Capacity by identifying and nurturing high-potential individuals who have the skills needed to achieve SJSC's current and future goals

- Action Items
  - Establish a SJSC Leadership Development Program
  - Executive Committee Chairs, Liaisons and Event Chairs will identify potential leaders
- Performance Indicators
  - Number of individuals who assume a leadership position for 2022-2023
  - Mid-year Executive Committee Review
  - Annual Report
- Personnel
  - Second Vice President, Organizational Development Chair

#### 5. Improve communication with membership and the broader community by utilizing print and electronic media

- Action Items
  - Increase the use of the website
    - Implement the use of a monthly e-mail tickler to encourage the viewing of the SJSC website
    - Increase the use of the website to promote events and to facilitate purchasing event tickets
    - Include pictures of individuals/groups recognized for their contributions on the website
    - Include pictures and title of the Board of Directors and Executive Committee
    - Include a reference to the website on all communications
  - Develop and publish a quarterly newsletter
  - Implement a monthly "Message from the President" blast
  - Expand our coverage in local newspapers and magazines
  - Conduct a survey in May, 2021 requesting feedback from members and the community
- Performance Indicators
  - 10% increase in the number of visits to the website
  - Mid-year Executive Committee review
  - Annual Report
  - Positive feedback in May, 2021 survey
- Personnel

- Second Vice President, Communications and Publicity Chair and committee, Technology Chair

## 6. Develop a Sponsorship Program

- Action Items
  - Create Sponsorship Liaison position
  - Develop a Sponsorship plan
- Performance Indicators
  - Increased number of sponsors for fundraising events
- Personnel
  - President, First Vice President, Fundraising Chair

## Advancing Goals

### 1. Develop a realistic and effective fundraising calendar

- Action Items
  - Limit the number of fundraising events to no more than six events per fiscal year
  - Require the fundraising event calendar to:
    - Balance volunteer's time commitments
    - Consider the limits of the St. James community's financial resources
    - Address the challenges of natural disasters/pandemics when they occur
  - Conduct a survey to gauge the success of each fundraiser
- Performance Indicators
  - A 2021-2022 fundraising event calendar with no more than six fundraising events that also addresses natural disasters/pandemics if they occur
  - Final Event Report will reflect the volunteer's perspective of time commitment manageability
  - Positive survey results from event attendees
  - Mid-year Executive Committee review
  - Annual Report
- Personnel
  - First Vice President, Fundraising Chair, Event Committee Chairs

### 2. Retain and/or increase membership by recruiting new members through a variety of strategies to build relationships with individuals

- Short Term Action Items

- Create a Welcome Information packet for new members to include a Certificate of Membership and relevant information about SJSC
- Long Term Action Items
  - Establish a New Member Outreach Program
    - Identification of specific strategies and actions to promote a welcoming and friendly environment at all Service Club General Membership meetings
    - Recruit greeters and ambassadors for each meeting
    - Annually update the new member Welcome Information Packet as needed
  - Implement a sign-in process to track attendance of members, new members and guests
  - Contact new members following their attendance at the Service Club General Membership meeting to get feedback on their meeting experience
  - Contact individuals who attend a Welcome Reception with a follow-up thank you and invitation to attend a future meeting
  - Recognize new members at the Service Club General Membership meeting and provide them with the Welcome Information packet
- Performance Indicators
  - Increase attendance at meeting
  - Number of new members
  - Informal and formal feedback from members and guests describing their reception/welcome at meetings
  - Mid-year Executive Committee review
  - Annual Report
- Personnel
  - Second Vice President, Organizational Development Chair, Membership Chair and Welcome Reception Liaison, a committee of members

### 3. Develop a Recognition Program

- Short Term Action Items
  - Recognition of individual volunteerism
    - Event chairs will receive a Volunteer Appreciation Certificate
    - A volunteer spotlight in the quarterly newsletter
    - Event/Service Project volunteers will be recognized on the SJSC website
  - Establish annual awards
    - Establish criteria for a President's Volunteer of the Year Award and solicit nominations from the membership, with final decision from President

- Establish criteria for a Fundraising Volunteer of the Year Award and solicit nominations from the membership, with the Board of Directors, who are ineligible, making the final decision
    - Establish criteria for a Community Service Projects Volunteer of the Year Award and solicit nominations from the membership, with the Board of Directors, who are ineligible, making the final decision
  - Implement a five-year Member Recognition Program
    - Set up the membership database to track membership years
- Long Term Action Items
  - Event/Service Project volunteers will be recognized at the monthly General Membership meeting
- Performance Indicators
  - All membership data is completed
  - Newly established annual awards are presented at the May General Membership meeting
  - Mid-year Executive Committee Review
  - Annual Report
- Personnel
  - President, VP(s), Organizational Development Chair

#### 4. Refine the General Membership meeting to promote a greater interaction among members and guests

- Action items
  - Vary the format and types of presentations
    - Collaborate with Vice Presidents and the General Membership meeting Organizer to identify general meeting criteria
    - Develop meeting agenda to vary the meeting format and types of presentations and to align with meeting criteria
  - Vary the times of the meetings to accommodate individual's schedules, such as evening, late afternoon, non-Wednesday meeting
    - Establish a meeting schedule to vary the meeting time 2x per year, between September and January, February and June
  - Offer small group activities, open forums and team building exercises
    - Identify strategies to facilitate member interaction (small group activities, open forums, team building activities) and focused attention on meeting topics
  - Conduct informal evaluations by BOD and EC following each meeting
- Performance Indicators

- Written feedback from meeting attendees every other meeting
- Number of attendees at varied timed meetings
- Informal evaluation by Board members and Executive Committee following each meeting. For example, what worked? What did not work? What can we do better?
- Evaluation of the strategies used throughout the year to facilitate interaction in General Membership meetings
- Mid-year Executive Committee Review
- Annual Report
- Personnel
  - President, VP(s), General Membership Meeting Chair

## Human Resources

The recently revised Policies and Procedures, including position descriptions for Board of Directors and Executive Committee members, clearly defines the roles and responsibilities of all leadership positions. We recognize the growing concern of finding people willing to take a leadership role in SJSC and have addressed that in our Strategic Goals.

The town of St. James is growing, providing an opportunity to increase our membership and volunteers. Many of the goals of the strategic plan focus on retaining and recruiting members. We especially will need members with technological, marketing, sponsorship solicitation and event planning skills.

## SWOT Analysis

### (S) Strengths

- Brunswick County recognition for a 23-year commitment to nonprofits and serving the needs of the community
- SJ community's positive perception of the organization – on a scale of 1-10 in the 2020 survey, SJSC was rated an average of 9
- Event planning and execution
- Successful fundraising
- Welcome Reception/access to new resident list
- Multiple opportunities for community involvement, volunteering and social connections
- Great relationship with Troon and St. James POA

## (W) Weaknesses

- Membership retention
- Lack of a warm welcoming and integration of new members into the club
- Leadership development and succession plan
- Lack of male members
- Monthly meeting content needs upgrade
- Number of fundraising events may affect volunteerism burnout
- Nebulous nature of fund distribution – where does the money go?
- Inability to communicate easily with entire SJ community
- Perception of the “clique-like” nature of SJSC

## (O) Opportunities

- Growth of St. James community
- Ability to capture the experiences and expertise of SJ residents
- Enhanced communication via website, newsletter and St. James Living magazine
- Online fundraising
- Link all fundraisers to fund development goals
- Marketing our mission clearly and concisely on website
- Increase connection of members to nonprofits
- Survey responses to inform decision-making and planning
- Developing a process to capture volunteer hours
- Refresh and renew General Membership meeting experience for all

## (T) Threats

- Multiple organizations competing for the same volunteers and dollars
- Competition for event dates/times and facilities
- Economic and social impact of natural disasters/pandemics
- People are overloaded with email

## Risk Analysis

This plan begins in a year of unknowns. COVID-19 restrictions are currently in Phase 2, but with a rising number of COVID-19 cases in North Carolina, it is not certain if we will move to Phase 3 anytime soon. Many of the goals require committee meetings and General Membership meetings. Committee meetings can be accomplished by cloud-based video communications. It may be difficult, or impossible, to hold a General Membership meeting, in which case the goal

cannot be met. As we have learned in the last two years, natural disasters such as hurricanes and pandemics can disrupt the best laid plans.

Our economy has yet to feel the full effects of COVID-19. It may be a year or more before we see the long-term effects. This could have a significant impact on fundraising.

With the continuing growth of the town of St. James, there are more organizations raising funds for a variety of causes. Residents have brought fundraising campaigns for national causes from their previous home locations and introduced them in St. James. Although very worthy causes, there is only so many facilities and dates to schedule such events.

## Financial Projections

This year is unprecedented, so it is very difficult to project fundraising. We will continue to cover all administrative costs with membership dues and distribute net profits from all fundraisers to Brunswick County nonprofits. Modified fundraisers have been planned for the second half of 2020, but it is very difficult to project profits. The grants awarded in 2019-2020 specifically targeted those nonprofits that would directly help families impacted by COVID-19 restrictions. The 2020-2021 grantees will remain as identified in 2019-2020. There have been two or three new nonprofits established that directly support families and individuals in need and we may consider them for a grant.

Hopefully, the 2021-2022 fiscal year will be a return to a new normal. We hope we can return to our annual fundraisers.