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ELLER BUSINESS CONSULTING EXECUTIVE SUMMARY

ROTARY DISTRICT 5500



Rotary
District 5500



ROTARY DISTRICT 5500

4313 N Placita de Susana, Tucson, AZ 85718



Overview

This executive summary represents the research conducted by the Eller Business Consulting (“Team”) on behalf of Rotary District 5500 identifying and building successful partnerships with local businesses. Rotary clubs rely on partnerships with businesses that share their values and commitment to making a difference. By partnering with Rotary, organizations can tap into a vast network of dedicated volunteers who are passionate about making a difference. This document outlines the research conducted, its methodology, findings and final recommendations and next steps in addition to a guide for Rotary clubs to identify potential partners, develop a value proposition, and craft measurable goals using the S.M.A.R.T. framework. Overall, this marketing plan provides a roadmap for Rotary clubs to build successful partnerships with local businesses aligned with their mission. By following the steps laid out in this plan, Rotary clubs can build better communities one partnership at a time.

Research Methodology

The Team extensively researched eight key areas to assess the feasibility of a marketing plan/ how a club should approach local businesses in the Tucson area:

- Identifying opportunities and obstacles for small and medium Rotary Club in the Tucson Area
- Understanding obstacles for small to medium business owners in the Tucson Area which can be assisted by Rotary Clubs
- Understanding interest and resource provisions by large businesses in the Tucson Area
- Identifying complementary/ overlapping community service groups available to Tucson Area.
- Identifying competing marketing methodologies adopted by these community groups in the Tucson Area
- Determining marketing suggestions best for the seven areas of focus of the club based on the research and interviews.
- Researching the demographics of the Tucson Area clubs.

This research utilized a combination of primary and secondary sources. When possible and appropriate, the Team interviewed subject matter experts to understand better the marketing frameworks that were available. In addition to these interviews, the team also cold called probable businesses and sent them surveys to them to obtain their feedback on the collaboration plan with the clubs in the Rotary District 5500. In all other instances, the Team utilized various vetted web sources to fill any gaps in knowledge.

Findings

The Team conducted 15 Presidential Rotary Interviews to help identify the priorities, their individual value propositions, values that can be proposed by the clubs, diversity within the clubs and their roadblocks. This was carried out by reaching out to the shared list of contacts and was spread over the current demographics of clubs within the Tucson Area of Rotary District 5500.

Through the Presidential Rotary Interviews, the Team found that funding was the primary priority for most Rotary clubs when collaborating with other organizations. The combination of volunteers and funding was the second most popular priority, followed by volunteers and members. This information can be useful in identifying potential partnerships and collaborations with organizations that align with Rotary's priorities. Additionally, the interviews revealed that clubs have different value propositions that they offer to their members and potential partners, with values such as expertise, promotion, empowerment, impact, and network growth. By leveraging these values, clubs can attract potential partners and create a culture of diversity and unity.

The Team also identified roadblocks that Rotary clubs face when partnering with other organizations. It is crucial to ensure that their values and goals align with Rotary's, and outreach and learning about potential partners is necessary to identify those who share similar values and goals. Engaging students requires resources such as time, money, and



expertise, and creative solutions and fundraising may be necessary to ensure that Rotary has the necessary resources to engage students effectively. Finally, fundraising is often necessary to support Rotary's partnerships and initiatives, and by engaging with donors and supporters, Rotary can raise the funds necessary to achieve its goals. Overall, the Team found that support for clubs from the district, in the form of speaker's initiatives, district support and grants, and collaboration with businesses and sponsors, is crucial to their success in making a positive impact in the community.

Following up with the club interviews, the team conducted 12 business interviews and cold called over 70+ businesses. Based on the business interviews, the following findings were discovered:

- **Clear Goals for Partnership:** Businesses and clubs should establish clear goals for their partnership that includes brand synergy, reputation, mutually beneficial opportunities, capability, and the ability to leverage networks.
- **Values Clubs can Bring:** Rotary members can provide expertise in areas such as operations, human resources, strategic planning, and other business-related topics. The clubs can provide promotion opportunities to local businesses through events, sponsorships, and marketing channels to increase their visibility and brand awareness. The clubs can empower local businesses by providing skills and volunteer services to help them achieve their goals of becoming more sustainable. The clubs can positively impact local businesses by providing them with opportunities to make a difference in their community and beyond through various service projects and initiatives. The clubs can provide opportunities for business members to build and maintain professional relationships, share referrals and knowledge, and create business opportunities through networking.
- **Partnership Risks to Avoid:** Businesses and clubs should avoid broad approaches, the absence of collaboration roadmap, and divergent agendas that could create risk for the partnership.
- **Power of Non-Profit Partnerships:** Partnering with non-profits can improve a business's community reputation and attract purpose-driven consumers.
- **Marketing Opportunities:** Partnering with non-profits can help solidify a brand in the community and act as a differentiator when consumers decide to make a purchase. In a global Nielsen survey, almost 60% of shoppers said they actively buy from brands they know, and 21% said they bought a product because they liked the brand.
- **Power Of Community Involvement:** Partnering with non-profits can improve employee morale, energize a client base, and increase employee engagement. Ninety-three percent of employees believe companies must lead with purpose, and 88 percent believe it's no longer acceptable for companies to make money at the expense of society at large.
- **Good Intentions to Tangible Impact:** Individuals and corporations care about the impact of their donations, and it is important to report out to them.

Recommendations & Next Steps

Based on our research and analysis, we recommend that Rotary District 5500 take the following steps to identify and build successful partnerships with local businesses:

- **Leverage personal and club networks:** Encourage Rotary clubs to leverage their personal and club networks to identify potential partners who share their values and commitment to making a difference. These networks can provide valuable leads and connections that can be explored further.
- **Research potential partners:** Conduct research on potential partners to ensure alignment with Rotary's mission and values. This can include checking their previous charitable acts, researching their mission and values, and building a list of potential partners with their contact information.
- **Develop a clear value proposition:** Develop a clear and compelling value proposition that articulates Rotary's unique selling points and differentiates the club from other charitable organizations. This will help Rotary clubs attract potential partners who are looking for specific opportunities to make a difference in the community.

- Use the S.M.A.R.T. framework: Use the S.M.A.R.T. framework to develop measurable goals that guide Rotary clubs' efforts towards achieving their mission. By creating specific, measurable, attainable, relevant, and time-bound goals, Rotary clubs can ensure that their partnership efforts are focused, measurable, and effective.
- Build trust and maintain communication: Building trust and maintaining open lines of communication with partners are essential for developing strong and lasting partnerships. Rotary clubs should regularly communicate progress and celebrate successes with their partners to maintain engagement and motivation.

The next steps for Rotary District 5500 should include the following:

- Follow a plan to disseminate the marketing plan to all Rotary clubs in the district.
- Provide training to Rotary clubs on the recommended steps for identifying and building successful partnerships with local businesses.
- Encourage Rotary clubs to form committees dedicated to partnership development and management.
- Establish a system for tracking and measuring the impact of partnership efforts to ensure that goals are being achieved and adjustments can be made as needed.

By following these recommendations and next steps, Rotary District 5500 can empower its clubs to identify and build successful partnerships with local businesses that are aligned with Rotary's mission and values. These partnerships can lead to increased visibility and awareness of Rotary, new opportunities for service and impact, and stronger relationships with other community leaders and organizations.

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