

# **CREATING THE QUOTA OF TOMORROW**

## **Status Report**

*January 1, 2012*

The purpose of the “Creating the Quota of Tomorrow” Research and Development plan is to expand Quota International’s service impact worldwide while translating and extending the Quota service experience to new generations of young people who care about their community and our world. In recent years, Quota International has been losing more individual members and more clubs than it has been gaining on an annual basis.

The initial six steps of the plan began operation in 2010. In 2011, the plan was expanded by the 2010-2011 board of directors to include a seventh step focusing on Quota International’s structure and governance. In addition, the board passed a motion making the Creating the Quota of Tomorrow an ongoing three-year plan that is updated semi-annually at Quota International board of director meetings.

The work plan and timelines which follow are estimates only and are subject to revision based on new information that is received through program implementation or research, funding changes, staffing changes, or any other factors that are identified. New tasks are added to the original three-year plan as determined at semi-annual board meetings.

### **FINANCING THE PLAN**

The projected cost of this project and to maintain a balanced budget for the period May 1, 2010 – April 30, 2013 (the plan’s first three-year period) is U.S.\$360,000 as follows:

- May 1, 2010 – April 30, 2011 – U.S.\$144,000
- May 1, 2011 – April 30, 2012 - U.S.\$129,000
- May 1, 2012 – April 30, 2013 – U.S.\$87,000

U.S.\$225,000 of the U.S.\$360,000 is for the Creating the Quota of Tomorrow plan, funds of which are being used to pay for the computer conversion, consultants, and resources needed to implement the plan. The board recommended that the money come from two sources: first, from the Quota International Reserve Fund and undesignated investments of Quota International; second, the endowment of the We Share Foundation.

The Board of Directors proposed a bylaw that was considered at Convention 2010 to allow the board to have authority over the endowment and use it in a way that will help ensure the future of Quota International and the We Share Foundation. While the board will maintain a reasonable reserve for emergencies, it believes that it is more prudent now to invest as needed in the future of the organization rather than hold additional cash in savings. When approval by the voting delegates at Convention 2010 was received in July 2010, the board of directors added Rule of Procedure 25 indicating that Quota International would keep a 4-6 month reserve and the We Share Foundation would keep a 24-month reserve.

## **December 31, 2011 Financial Status Report**

From April 1, 2010, through December 31, 2011, Creating the Quota of Tomorrow plan direct costs have totaled U.S.\$105,326.

### **July 1, 2011 – December 31, 2011 Costs - U.S.\$32,264**

Web Site Redesign/Database Conversion-continued work	\$10,519
Creation, Design, Writing of Publications/e-Communications	\$10,705
Publicity/Media Programs/Club Tools & Resources/Printing	\$ 7,490
International Service Program Expansion	<u>\$ 3,550</u>
	\$32,264

### **April 10, 2010 – June 30, 2011 Costs - U.S.\$73,062**

Publicity/Media Programs/Club Tools & Resources, New Member Brochure	\$13,478
Listening Tour Travel, Materials, Data Collection	\$ 9,281
Web Site Redesign/Database Conversion	\$31,560
Creation, Design, Writing of Virtual Publications	<u>\$18,743</u>
	\$73,062

Many if not most of the activities are conducted by Quota's current staff, so while time and effort is certainly taking place, no staff time is being charged to the Quota of Tomorrow plan direct costs. In addition, the countless volunteer hours that our members and Quota leaders have devoted to this project are not included. Without those contributions, the program could not operate. *Many thanks go to all who are working so hard to make the Quota of Tomorrow a reality that will last for years to come.*

## **STEP 1: STRENGTHEN OUR CLUBS AND THEIR LEADERS**

### **GOAL: Improve Club Flexibility**

*Increase flexibility with which current clubs operate; at Convention 2010 eliminate bylaws that prescribe meeting numbers. Let each club set their own requirements.*

**January – February 2010:** Research bylaws, discuss at board meeting, refer to bylaws committee - **COMPLETED**

**March 2010:** Announce proposed bylaws - **COMPLETED**

**July 2010:** Vote on proposed bylaws at Convention 2010 - **COMPLETED**

**August 2010:** Announce vote on bylaws on Web site **COMPLETED**

**February 2011:** Assess ongoing success of improving club flexibility at board meeting as well as identifying any potential areas for change. **UNDERWAY—BEING ADDRESS VIA STRUCTURE AND GOVERNANCE PROPOSAL**

### **GOAL: Strengthen Existing Quota Clubs**

*Train Quota members in how to operate a successful Quota club today and in the future via eight hours of Convention 2010 general session leadership and club development training over three convention days. Topics will include membership D&G, leadership development, and publicity and will be presented by service club organization expert Cynthia D'Amour of People Power Unlimited and President-elect Gwenn Jackson. Training will be promoted at district conferences and in communications from Quota International, area directors, and district governors.*

**January – June 2010:** Identify a potential trainer for Convention 2010 (Cynthia D'Amour). Plan the Convention 2010 training program. Prepare handouts, materials, and necessary script. **COMPLETED**

**April – May 2010:** Create the 2010 Club Visit Program (containing most important lessons from Cynthia D'Amour training). Disseminate to board members for preparation for Governors Seminar Training. **COMPLETED**

**July 2010:** Present Governors Seminar Training with instruction in use of Club Visit Program. Review the program with governors and answer questions. **COMPLETED**

**July 2010:** Present the Convention 2010 Training Program. Promote Cynthia's books and free resources and Webinar series. **COMPLETED**

**August – November 2010:** Governors present the 2010 Club Visit program and promote Cynthia D'Amours concepts and resources. **COMPLETED**

**September 2010:** Doubled number of Leadership e-Alerts from three to six per year (January, March, May, September, October, November). **COMPLETED**

**February 2011:** Add a password-protected Club President Center to the revised Web site with club tools, resources, information, Leadership e-Alert archive, and more to assist club presidents with strengthening and operating their clubs. **COMPLETED**

**April 2011 – Ongoing:** Reinforce Cynthia D'Amour recruitment and retention lessons and ongoing free Webinar series at 2011 District Conferences and 2011 Club Visits. Continue to promote as opportunities arise. Add to Quota Training Seminar program script presented by district governors to incoming club leaders. **UNDERWAY & ONGOING**

**February 2011 – June 2012:** Launch and promote the "Give Me Five" program encouraging every club to recruit five new club members or launch and mentor a branch (with a minimum of five members). Presented at 2011 District Conferences and followed-Up at 2011 Club Visits and 2011 Area Meetings. Will continued to be promoted through the year. **UNDERWAY& ONGOING.**

**February 2011:** Create and publish a 2011-2012 Club President's Orientation Guide that is provided to all incoming club leaders and published on the Club President's Web Center on [www.quota.org](http://www.quota.org). **COMPLETED**

**September 2011:** To improve readability and look, begin creating *Leadership e-Alert* and *Quota Quick Update* e-communications in upgraded, professional e-newsletter software. **COMPLETED**

**September – November 2011:** Offer club recruitment and retention training, including Cynthia D'Amour recruitment and retention lessons, at 2011 Area Meetings. **COMPLETED**

### **GOAL: Connect Club Members and Leaders to FREE Resources**

*Both Quota International and Cynthia D'Amour offer resources. Since Cynthia does such a fabulous job in creating resources and sponsoring free Webinars, continue to promote Quota member and leader connection to her resources and her Web site.*

**January – December 2010:** Promote and/or provide increased membership recruitment, retention, and leadership resources to all club members including Quota International resources and Cynthia D'Amour Resources. Promotion will take place at Convention, Club Visits, on the Web, and in Leader e-communications.

Resources include:

-Quota International Membership Recruitment PowerPoint – published January 2010 - **COMPLETED**

-Quota International "Right Now" Media Program – to be unveiled July 2010 - **COMPLETED**

-Quota International Public Service Announcements – **COMPLETED**

-Cynthia D'Amour Resources, Books, and Web site – promoted since January 2010 – **UNDERWAY& ONGOING**

-Cynthia D'Amour Webinars – promoted since January 2010. **UNDERWAY & ONGOING**

**February 2011 - Ongoing:** Continue promotion of resources on Quota International Web site, in e-communications, and as appropriate at district and area meetings. Assess need for potential new tools and additional promotion mechanisms. [UNDERWAY & ONGOING](#)

**July 2010 – December 2010:** Seek permission to music rights to the three Quota Convention 2010 Musical PowerPoints to enable viewing on Quota Web site and free distribution to Quota club. Publish media programs on Quota's Web site. [COMPLETED](#)

**July 2010:** Publish Convention 2010 Club to Club World Service Presentation on Quota Web Site for Club use. [COMPLETED](#)

## **Step 2: Attract New Constituencies to Quota**

*Grow Quota by attracting new and younger constituencies to Quota.*

### **GOAL: Share Information on Dynamics of Future Generations**

**July 2010:** Educate existing membership on Generations XYZ and what they want from Quota membership: Convention 2010 presentation by President-elect Gwenn Jackson on the differences between Generations XYZ from current generations of Quota members. Facilitation of a Convention 2010 panel composed of a Generation X Quota member and a Generation Y Quota member by Cynthia D'Amour of People Power Unlimited. [COMPLETED](#)

**July 2010:** Publish Gwenn Jackson's PowerPoint Program on Generations XYZ on Quota Web site. [COMPLETED](#)

### **GOAL: Research and Develop New Constituencies**

**August 2010 – September 2011:** Quota Listening Tour Planning, Implementation, Data Analysis:

**May – June 2010:** Create script for focus group program that selected volunteer leaders can present in their own or a nearby Quota community. [COMPLETED](#)

**July 2010 – June 2011:** Promote Listening Tour focus groups beginning at Convention, then on the Web, and in club e-communications. [COMPLETED](#)

**September 2010 – June 2011:** Collect feedback from young people and filter to QI. Purpose to learn how young people would want to participate in Quota. [COMPLETED](#)

**October 2011 to June 2012:** Use data to create a plan of follow up action. [UNDERWAY – Plan of action already created via the structure and governance proposal.](#)

**September 2012 – December 2012:** Use data collected during the 2010-2011 year to plan next strategic steps in connecting younger people to Quota via current or new Quota clubs. Depending on results obtained, reach out to young people who participated in focus groups as potential Quota club members. *[Related to outcome of structure proposal.]*

## **Step 3: Organize 100 New Clubs By Quota's 100<sup>th</sup> Birthday**

*Grow Quota by organizing traditional, centennial and non-traditional Quota clubs and branches.*

### **GOAL: Organize "Traditional" Quota Clubs and Branches**

**July 2010:** Honor new club organizers at Convention 2010. [COMPLETED](#)

**July 2010:** Discuss new club organization at Convention 2010 and the Convention 2010 Governor's Seminar. Plan a meeting of all people involved in new club organization or interested in organizing a new club at Convention 2010. [COMPLETED](#)

**July 2010 – December 2012:** Follow up with “Gumbo Groups” (created at 2009 area meetings) that have identified a service need in a new Quota community or others who are interested in organizing a new club in a new community. Ongoing effort honchoed by D&G Chair and Board of Directors. **UNDERWAY & ONGOING – ALSO BEING ADDRESSED VIA STRUCTURE AND GOVERNANCE PROPOSAL**

**January – March 2011:** Revise existing new club and new branch organization materials into “Club Builders Guide” – with companion/coordinating Silver Q and Branches Guides.

**COMPLETED**

**February 2011:** Revise the Centennial Service and Growth Program improving and expanding financial rewards for the organization of new clubs and new branches with new members. Publish the program changes on the Quota Web site and promote in e-communications and presentation. **COMPLETED**

**February 2011 - Ongoing:** Promote availability of revised guides on Web site, in e-communications, and through leaders. Other promotional activities as warranted. **UNDERWAY & ONGOING**

**February 2011 - Ongoing:** Assess status of organization of traditional clubs at board meeting and determine any new direction in plan or any need for additional materials. **UNDERWAY & BEING ADDRESSED VIA STRUCTURE AND GOVERNANCE PROPOSAL**

**February 2011 – June 2012:** Launch and promote the “Give Me Five” program encouraging every club to recruit a net gain of five new club members or launch and mentor a branch (with a minimum of five members). Presented at 2011 District Conferences and followed-Up at 2011 Club Visits and 2011 Area Meetings. Will continued to be promoted throughout year.

**UNDERWAY**

**July 2011:** Assess status of organization clubs and branches at board meeting. **COMPLETED**

**February 2012:** Assess status of organization of clubs and branches at board meeting.

**July 2012 (and all future board meetings):** Assess status of organization of clubs and branches at board meeting.

**July 2012:** Honor new club organizers at Convention 2012.

### **GOAL: Research and Develop Non-Traditional Clubs**

*Lions International has had success in increasing membership through new club organization. Examine non-traditional types of clubs operated by Lions International for possible translation to Quota International [Cyber clubs; campus clubs; young adult clubs for people 35 and younger].*

**June 2010 – February 2011:** Create guidelines for non-traditional clubs (“Next Gen” Guide) and promote, distribute, and publish on Web site. **COMPLETED**

**February 2011:** Assess status of research and development of non-traditional clubs at board meeting and determine any new direction in plan. **COMPLETED**

**July 2011:** Assess status of organization of non-traditional clubs at board meeting and determine any new direction in plan or any need for additional materials. **COMPLETED**

**February 2012:** Assess status of organization of non-traditional clubs at board meeting and determine any new direction in plan or any need for additional materials. **UNDERWAY** [Being done through Step 7, Structure and Governance proposal.]

**July 2012:** Assess status of organization of non-traditional clubs at board meeting and determine any new direction in plan or any need for additional materials.

**August 2012:** Revise guidelines for non-traditional clubs based on the outcome of the structure and governance proposal at Convention 2012.

## **Step 4: Love Our Leaders**

*Increase the effectiveness of district and club leaders.*

### **GOAL: Improve District Leader Training**

**March – May 2010:** Revise Governors Seminar Training Seminar to emphasize the three most important ways Governors can make a difference (plan a great district conference, organize a new club, connect with club leaders and members one-on-one) along with the nuts and bolts of the Governor's duties. Also revise the 2010-2011 Governor's Guidebook to reflect the changes in training. **COMPLETED**

**July 2010:** Present the revised training program and evaluate it. **COMPLETED**

**February 2011-June 2011:** Create an expanded orientation guide for district leaders that is presented to the incoming leaders at 2011 district conferences. **COMPLETED**

**April – July 2011:** Create a new version of district leader training for area directors to provide to incoming district leaders who did not attend 2010 Governors Seminar. Train leaders after district conferences end. **COMPLETED**

### **GOAL: Increase District Leader Resources**

**July 2010:** Distribute via the 2010 Governors Guidebook and post on [www.quota.org](http://www.quota.org) new district conference tools and resources for governors to use in planning district conferences. These include a new speakers roster for potential district conference speakers, sample script, planning timeline, and more. Publish new resources on Quota Web site. **COMPLETED**

**July 2010 – June 2011:** During revision of Quota Web site, improve FOR DISTRICT LEADERS Web site. **COMPLETED**

**February 2011:** Publish the Governor's Guide Resources online. **COMPLETED**

### **GOAL: Improve Club President Training**

**July 2012:** Stengthen existing clubs by improving the training of new club presidents via a Club President Leadership Seminar Training at Convention 2012. **UNDERWAY**

### **GOAL: Develop On-Line Communities/Training Opportunities**

**August 2012 – April 2013:** Assess potential for creating on-line leadership community for Quota club and district leaders AND past leaders to "interact" on-line. Evaluate capabilities and value for providing on-line training for district leaders and club presidents. Create products and develop strategy as determined.

## **Step 5: Expand, Celebrate, and Promote our Service**

*Expand Quota's international service, its ability to communicate with members on service, and its ability to empower members to publicize local service in their communities.*

### **GOAL: Expand Club-to-Club World Service [Now Called Hand-in-Hand World Service]**

**July 2011:** As Quota's signature international service program, expand Club to Club World Service by two projects for 2011-2013 term. (Continue to expand number of projects with each new term.) **COMPLETED** *(Three new projects identified for 2011-2013 – goal exceeded.)*

**July 2011-June 2010:** Develop a new "outside" name that Quota International can use to market the Club to Club program OUTSIDE of Quota International. Increase promotion of program. **COMPLETED**

**July 2011:** Write and publish a special Web e-Zine on 2011-2013 Club to Club Projects for members and the general public. **COMPLETED**



**January 2012:** Launch a message board on Quota's Web site where Hand-in-Hand projects can self-report updates and progress. **COMPLETED**

**June – September 2011:** Create and launch a new Hand-in-Hand World Service Public Awareness Campaign including a new musical video.

**September – November 2011:** Promote new program and new program name at 2011 Area Meetings. **COMPLETED**

**GOAL: Expand Participation, Promotion of Junior Quota Club Mentoring Program**

**May 2010 – January 2011:** Encourage more clubs to “adopt” the Junior Quota club mentoring program through increased promotion and a presentation at Convention 2010. **COMPLETED**

**May – December 2010:** Create a new promotional name for the Junior Quota Club Program and update promotional materials to include guidelines for mentoring a junior Quota club on college campuses as well as in high schools. **COMPLETED**

**February 2011:** Create a new JQ logo. **COMPLETED**

**July 2011 – October 2011:** Create a new JQ membership pin. Promote and sell at 2011 area meetings and in Quotarian magazine. **COMPLETED**

**January 2011 – Ongoing:** Increase promotion of the JQ Club Program through Quota's Web site, e-communications, Quotarian magazine and 2011 area meeting presentations. **UNDERWAY & ONGOING**

**February 2011:** Board approves partnership with Youth Services of America, an international organization that supports the efforts of students involved with community service.

**COMPLETED**

**July 2011 – June 2012:** Launch and promote YSA partnership and its benefits, resources, and opportunities with Junior Quota Clubs and Mentoring Clubs during 2011-2012 Quota year.

**UNDERWAY & ONGOING**

**GOAL: Expand Participation, Promotion of Cops 'n' Kids Literacy Program**

**January 2012 – June 2012:** Obtain resources and materials from clubs participating in Cops 'n' Kids to share on Quota's Web site. Research new literacy-related resources. Increase promotion of and participation in the program. **UNDERWAY**

**GOAL: Expand Health Hearing Campaign**

**February 2011:** Board approves partnership with Audiology Society of America (an international organization). **COMPLETED**

**February 2012-July 2012:** Create and launch an expansion to the Healthy Hearing Campaign: Noise Induced Hearing Loss in Youth Awareness Program. Adapt Audiology Society of America's resources and materials for use by Quota International members in promoting hearing health in youth. Provide guidelines for Quota clubs to connect with Audiology Society members in their communities.

**GOAL: Strengthen and Expand PR**

**January - April 2010:** Create and expand Quota's presence on social media sites including Facebook, Twitter, and LinkedIn. **COMPLETED**

**January – July 2010:** Create a variety of PR projects for Quota clubs. In 2010 new products include/will include: Quota Cares Month PR tools, Membership Recruitment PowerPoint, Quota Media Program, Public Service Announcements. **COMPLETED**

**July 2010:** Empower members and clubs with their publicity efforts with a Convention 2010 workshop on publicity created by Quota International. Program to include helping clubs

understand and use social media to promote their efforts. Unveil new Quota International PR tools. **COMPLETED**

**February 2011:** Added Quota Channel on YouTube for collecting of club created videos and added links on Quota's new Web site. **COMPLETED**

**July 2010 – June 2011:** Revise Quota International's publicity tools and resources when revising the Quota International Web site. Add PR projects to the site so that Quota members can download and use all PSAs, media programs, and resources. **COMPLETED**

**February – May 2011:** Add new PR resources for clubs including electronic version of new Quota PR logo; club and district stationery with new Quota look; Web template that clubs can download and use. **COMPLETED**

**June 2011 – December 2011:** Promote resources on Web site. **UNDERWAY & ONGOING**

**September 2011 – December 2012:** Determine the need for more resources and create if funds permit including the creation of radio PSA scripts that clubs can download and use in creating local radio PSAs. Created and disseminated a new media program at 2011 area meetings.

**UNDERWAY & ONGOING**

## **Step 6: Evolve Quota's Infrastructure Today for Tomorrow**

*Translate Quota's operations to a system that will match what is needed tomorrow. Eliminate or revise what is not working; make better use of technology in operating; rebrand Quota International look.*

**GOAL: Rebrand Quota and Expand Web-Based Communications/Translate to Web-Based Operation** Highlights of this very comprehensive project include:

**January - February 2010:** Gain board approval. **COMPLETED**

**January – April 2010:** Research consultants, request bids. **COMPLETED**

**May – June 2010:** Preliminary planning with consultant. **COMPLETED**

**August 2010 – June 2011:** Create a new look for Quota's Web site and a new logo. Transition database to web-based system; revise Quota Web sites and content. "Marry" Web site to "database system so that they interact. Create online donations section, members only section, online publications and jewelry orders, online membership record update site, PR page, and other features Unveil by June 2011 (earlier in 2011 hoped for, but not guaranteed). **COMPLETED**

**August - February 2011:** Redesign and plan on-line Quotarian Magazine. Publish February 2011. **COMPLETED**

**October 2011:** Expand from one to two Quotarian magazines annually beginning in 2011 (approximately 16 pages each—February and August): **COMPLETED**

**March – July 2011:** Create a new Quota International membership brochure that members can customize and use. **COMPLETED**

**July 2012:** Publish new professional networking feature on Quota Web site.

**July 2012:** Publish new Quota e-Store on Quota Web site.

**September 2012 – July 2013:** Assess need for additional online member, leader and past leader communities. Add additional features desired on the Web site as needed and time and funds permit. *[Wait for outcome of structure proposal outcome]*

**September 2012 – July 2013:** Reassess Quota's e-communications program; assess whether new communications for younger generations of Quota members are needed; etc. *[Wait for outcome of structure proposal outcome]*

**September 2012 – July 2013:** Assess need for and ability to create customized Webinar training for club presidents and district governors. *[Wait for outcome of structure proposal outcome]*



**GOAL: Reorganize, Streamline, Improve Quota Operations and Systems**

**February 2010- December 2012:** Assess, Improve, Simplify, Reorganize, and/or Delete as needed Quota International headquarters systems, operations, files to help Quota become a totally Web-based, paperless office with support and resources going to the most important activities that will make the most difference to the future of Quota International and its current and future members. This is an ongoing, internal project that will be carried out as time and resources permit. **UNDERWAY & ONGOING**

**Step 7: Assess Quota International's Structure and Governance System**

*Assess Quota International's structure and governance system for effectiveness and cost.*

**GOAL: Launch Quota Task Force to examine structure and governance issues and costs.**

**February 2011-July 2011:** Board of Directors creates Structure Task Force composed of 2010-2011 board members. Task force explores issues related to structure and governance and reports findings at 2010-2011 Board of Directors Meeting to be held in July 2011. **COMPLETED**

**GOAL: Assess Quota International's structure and governance system for potential change.**

**July 2011:** 2010-2011 and 2011-2012 boards discuss first draft proposal. 2011-2012 board approves draft proposal. **COMPLETED**

**September – October 2011:** Create a structure and governance proposal presentation. Present at all 2011 Quota International area meetings. Collect feedback from small group discussions. **COMPLETED**

**November 2011 – January 2012:** Tabulate structure and governance proposal feedback received from 2011 area meetings and prepare report for board of directors. Prepare and draft bylaw revisions needed to implement the program. Collate individual responses submitted by members, clubs and districts for the board to review at the February 2012 board meeting. **COMPLETED**

**February 2012:** Quota International board of directors reviews proposal feedback and makes revisions, if any. The board of directors determines proposed regions and proposed bylaw changes. Approve proposed bylaws reflecting these changes.

**April – June 2012:** The board's revised proposal and impacted bylaw changes are shared at 2012 district conferences and published on Quota's Web site. Feedback is obtained. The board will monitor feedback results on an ongoing basis as district conferences are held.

**July 2012:** The final structure and governance proposal will be presented and discussed at the Convention 2012 town meeting. Voting delegates will vote on related proposed bylaw changes at the Convention 2012 bylaws session. If the proposal is accepted and proposed bylaws passed, the convention body will be educated on "next steps" in a Convention 2012 presentation.

*[Additional action and educational goals will be added to Step 7 if and when the structure and governance proposal is voted in at Convention 2012.]*