



# Gallatin Valley Newcomers Club Strategic Plan February 27, 2020

Yesterday I met a stranger . . .

Today that stranger is my friend.

# Introduction

The Gallatin Valley Newcomers Club (GVNC) is a vibrant social and charitable non-profit organization currently with over 300 members. As the Gallatin Valley has continued to grow, so has the GVNC. Our Board of Directors initiated a strategic planning effort in 2018 to help ensure the GVNC meets the needs and expectations of our diverse membership while streamlining operations and encouraging more members to become involved in the leadership and evolution of the organization. The Board's strategic planning work included the following steps:

1. Development of Mission and Vision statements
2. Analysis of strengths, weaknesses, opportunities and threats (SWOT analysis)
3. Development of Strategic Objectives
4. Development of measurable actions to help meet the Strategic Objectives

This strategic plan will be a guiding document for the Board in the years ahead. A portion of future annual Board retreats is expected to include revisiting the plan, reviewing accomplishments and identifying additional priorities that should be addressed in the future.

## Mission

The mission of the GVNC is to help all members integrate into the community and foster lasting friendships, support local non-profit organizations, and thereby enhance the vitality of the Gallatin Valley.

## Vision

The vision of the GVNC is to be well-recognized as an inclusive and welcoming organization for those seeking new friendships and opportunities in the Gallatin Valley.

## GVNC History

In 1979, a group of men and women started a Bozeman chapter of Meals on Wheels as a social and philanthropic club. Newcomers was part of Meals on Wheels at the time. In the 1990s, several of the members spun off from Meals on Wheels and started a Newcomers Club in Bozeman. They followed the suggestions from other Newcomers clubs nationwide, but later changed the mission to encourage not only newcomers but current residents to join. In the early to mid-1990s, Newcomers was a purely social group. Luncheons were held once a month at different restaurants around town. The group was small. An annual auction was held to support the workings of the club, and proceeds were not necessarily donated to any non-profit.

In 2005, Newcomers was granted 501(c)(3) status by the IRS and became, by definition, a charitable corporation. The stated purposes include making charitable donations to organizations that qualify as exempt under Section 501(c)(3) of the Internal Revenue Code. A Newcomers Constitution was submitted to the IRS in 2005 along with other governing documents. In 2014 the Constitution was updated and in 2020 the Constitution was replaced by a new set of Bylaws in compliance with Montana state law. Fundraising became an integral part of Newcomers after the 501(c)(3) designation was approved.

The primary purpose of the club is to help newcomers, newly retired newcomers, empty nesters or anyone else who has some free time and who lives in the area to assimilate into the civic and social activities of their community. Newcomers is a social, fund-raising and educational non-religious club and has always been very welcoming to anyone coming through the door.

Remember our motto:           Yesterday I met a stranger . . .

  Today that stranger is my friend.

Newcomers started interest groups like marathon bridge, book clubs, monthly excursions to places of interest in the community and games groups. Gradually, more groups were added when a member suggested one that was of interest to her, and it was a group she was willing to lead. Now the club has 20 interest groups and is always willing to consider new ones.

In 2004 Newcomers started giving to the Gallatin Valley Food Bank on a monthly basis. Since that time Newcomers members have donated food, egg cartons and paper bags to the food bank. Sue Lambert has kept food bank donations organized. She is a past president of Newcomers and past auction chair. Currently, she is a hero. She announces the “theme” for food donations in advance, and then collects the food, checks the packaging, collects egg crates and bags, and even checks Easter baskets to make sure they are acceptable as a donation. Over the past seven years, Newcomers has donated more than 8,247 pounds of groceries and non-food items to the food bank.

In 2003 or perhaps in 2004, Newcomers decided to donate some of the funds earned from the Christmas auction to local non-profit organizations. A non-profit organization was chosen by the auction committee, approved by the membership and the auction was off and running. The auction was much less sophisticated than what it is today. In 2018 the club invested in software to streamline accounting and bidding for the auction. Net proceeds have grown almost every year, and accounting for the income has become more complicated. In 2004, the first year we have figures for, \$5,700 was raised. More recent proceeds include: \$15,540 in 2014; \$20,264 in 2015; \$22,800 in 2016; \$23,755 in 2017; \$23,400 in 2018; and \$22,750 in 2019.

In the early years of the auction, members made donations of items they were willing to “regift” and items they purchased on sale. In the beginning, Newcomers was fortunate to have

vacation houses and trips donated to the auction to keep it interesting. Baked goods were an integral part of the auction as they are now. In 2009 and 2010, the club saw auction proceeds decrease because of the downturn in the economy, and decided that additional fundraising projects would be helpful.

Several members created a cookbook in 2010 called Mountain Ranges. The project was tremendously labor intensive but provided a steady income stream for several years. It's now a collectors' item. In 2012 Newcomers held a giant garage sale at Hope Lutheran Church. The church provided the tables for the treasures and the members set to work. The club netted about \$3,000 from the sale and donated these funds to the Gallatin Valley Food Bank to supplement the supplies donated on a monthly basis.

In 2011, Sunrise Rotary Club approached Newcomers. They were starting a project called the "Fix-up Festival" and wanted us to participate. Social services found eligible families and community non-profits supplied the labor. They needed money from the club to help buy supplies that were used to assist homeowners "fix up" their houses. We participated in the festival for two years. The first year we helped a gentleman living on Willson St to make his house more wheel chair friendly, and the second year we were fortunate enough to help a former Newcomers member fix up the outside of her house.

In 2010, special evening events were started. The membership was reacting to the requests from members to hold events where men would be comfortable. Newcomers held evening events for five years. We had some great speakers/entertainers, but we found that the men weren't particularly interested in attending.

In 2013 the 50/50 raffle was introduced. We needed to update our website and purchase new software and a computer, and the club didn't have the money. Rather than infringe on fundraising dollars, the Board decided to dedicate half of the 50/50 raffle proceeds to these technology purchases. The need for updates and a new computer was announced at a luncheon. Combined with an anonymous donation of \$850, the club raised enough to buy the software and hardware to stay up to date. We continue to hold the 50/50 raffle to help defray club operating expenses.

The first New Member picnic was started in 2013. The Board thought it would be a nice gesture to recognize the new members, and give them a relaxed place to get to know more women. That picnic was held at the Elk Grove Community Center and had attendance of about 35. Our Ann Marshall was even then in charge of groceries and dessert. Ann has been one of our most stalwart members. She takes care of the luncheon menus, plans programs again and again, and helps everyone feel comfortable and welcome – a real Newcomers super star.

In 2014 Esther Leutwyler created The Garden Gate Flower Book as a fundraiser. It is a beautiful book with photographs Esther has taken of flowers in the area. We sold the books for two years and then donated the unsold books to area retirement and nursing homes.

In 2010 membership hovered at about 120 with ten interest groups. Newcomers has now marched forward to 2020 with more and more members, over 300 at last count, more interest groups and an on-going commitment to make sure local charities are supported by our club. Members have participated in Bozeman Clean-up day and helped with other philanthropic community events over the years.

Following is a list of Newcomers Presidents covering most of a 25-year period.

1995-1996	Judy Rente
1996-1999	Unknown
1999-2000	Diane Hayden
2000-2001	Michelle Neely
2001-2002	Erin Peppus
2002-2003	Unknown
2003-2004	Susan O'Hara
2004-2005	Joan Kerstein
2005-2006	Susan Woods
2006-2007	Ann Marshall
2007-2008	Connie Trandem
2008-2009	Sue Lambert
2009-2010	Barbara Pastine
2010-2011	April Buonimici
2011-2012	Linda Rodgers
2012-2013	Linda Rodgers
2013-2014	Nancy Xander
2014-2015	Donna Layton
2015-2016	Jennifer Trainer
2016-2017	Katie Pederson
2017-2018	Betsy Day
2018-2019	Betsy Day
2019-2020	Cathy Conover

## GVNC Organization

The GVNC is run by member volunteers with a range of talents and interests. Members who may be interested in assuming leadership roles, either at the Board level or Interest Group level, are strongly encouraged to talk with current leaders to learn more about those roles. It is essential to the vitality and success of our organization that we have a broad cross-section of members in volunteer roles and that we plan for the succession of our leadership.

A Board of Directors oversees overall operations. The Board is comprised of an Executive Committee (President, Vice President, Treasurer, Secretary and immediate Past President) and additional supporting Board members.

A Nominating Committee is chaired by the Vice President. The Nominating Committee identifies potential new Board members and Executive Committee members. The Nominating Committee may include both Board and non-Board members.

Each Interest Group is led by a chair or two or more co-chairs. GVNC encourages Interest Group co-chairs so the work is spread among members and to ensure smooth leadership succession.

## Strategic Objectives and Actions

In 2018, a committee was formed to begin work on a strategic plan. The committee drafted vision and mission statements and conducted a SWOT analysis to analyze the organization's strengths, weaknesses, opportunities and threats. A set of strategic objectives was then developed based on this analysis. At the board retreat in mid-2019, possible action plans were identified for each of the strategic objectives. Over the past 6 months, the Board has initiated work on many of these action plans.

The Strategic Objectives and associated actions undertaken to date are provided below.

### Foster Inclusiveness, New Member Integration and Overall Membership Satisfaction

One of the basic tenets of GVNC is to welcome new members to the club. We have occasionally heard feedback that guests and members attending our functions do not always feel as comfortable and welcomed as they should. To be successful in our mission, we must keep the entire membership engaged and vested in the vitality of GVNC. This is critically important for our long-term stability and success.

Actions taken to date:

1. Every few months, the seating at the luncheon is a “Mix it up” to provide opportunities to make new friends by sitting with new members or others they don’t know that well.
2. The reservations chair calls each new member to personally invite them to the next luncheon or coffee.
3. The newsletter is emailed to the entire membership after each luncheon to keep everyone informed, especially if they were not at the luncheon.
4. A member survey was sent electronically to all members to provide input on what we do well, what we can improve and suggestions for change.

### Manage the Effects of Membership Growth

Membership growth is inevitable and we need to continue to meet the needs and interests of our membership as we grow. However, growth presents challenges. For example, membership growth can 1) weaken the sense of community; 2) lead to logistical problems of venue size for coffees and, potentially in the future, luncheons; and 3) result in Interest Group sizes becoming unwieldy. These and other challenges need to remain at the forefront of our planning.

Actions taken to date:

We have not resolved this issue, and membership continues to grow each month. Considerations are to require RSVPs for coffees; hold coffees at larger commercial establishments (we will be holding one at Fork and Spoon) and identify possible luncheon venues if/when luncheon attendance is beyond Riverside's capacity.

## **Increase the Number of GVNC Volunteers**

Volunteerism is an important issue for our organization. The organization should increase the number of volunteers to reduce the strain on current volunteers and provide opportunities for all members to develop new friendships by working together on activities and events.

Actions taken to date:

1. The Heart of the Organization award was established to recognize an outstanding volunteer each year. A donation is made to the charity of choice in honor of the volunteer selected. Sue Lambert was our 2019 recipient, recognizing all her work for the Gallatin Valley Food Bank.
2. A template has been developed which can be used by committee chairs and interest group leaders to divide the workload and plan for leadership succession.

## **Evaluate Our Fund-raising Activities**

GVNC's mission states the organization will enhance the vitality of our community by supporting local non-profit organizations. GVNC needs to continually evaluate fundraising activities to ensure they meet the needs of the community and the organization while monitoring the strain these activities place on volunteers and members.

Actions taken to date:

A committee has been appointed and charged with reviewing our fund-raising activities. Suggestions generated during the 2019 annual Board retreat, the charity auction debrief, and the member survey will be considered by the committee.

## **Facilitate the Establishment of New Interest Groups**

GVNC must endeavor to meet the desires of members by facilitating the creation of Interest Groups. Our members have diverse interests and skills, and hail from all over the country.

Guidance on the formation and leadership of Interest Groups may encourage the formation of new groups. A robust set of Interest Groups led by our diverse membership will lead to greater member satisfaction.

Actions taken to date:

1. A mid-year Interest Group fair will be held in April to provide opportunities for new activity sign-ups.
2. Guidelines have been developed for starting new Interest Groups.
3. Several new groups were started in 2019.
4. The member survey asked for ideas for new Interest Groups.

## Continually Seek to Improve Governance and Operations

As a thriving non-profit, our organization must keep an engaged Board of Directors and continually improve operations to reflect current membership needs and the organization's goals. Examples include updating the organization's structure and policies as needed, maintaining the security of the organization's data and enhancing the organization's website to ensure ease of use and to promote information flow.

Actions taken to date:

1. A Procedure Manual is being developed which will contain the position descriptions of each officer and committee chair, as well as policies and guidelines for the organization.
2. By-Laws have been drafted and include term limits for board members.
3. A major review of our insurance needs and available policies is being undertaken.
4. A Suggestion Box has been added to the web site.
5. The Board is reviewing its organizational structure with the goal of increasing overall efficiency.