

Three-Year Membership, Marketing and Fundraising Plan

Presented to:
The City Club of Portland



Metropolitan Group

Communications that make a difference.

Presented by:
Eric Friedenwald-Fishman
John Stuart (J.S.) May
Bryan Markovitz

July 26, 2004

TABLE OF CONTENTS

ACKNOWLEDGMENTS.....	3
EXECUTIVE SUMMARY	4
SITUATION ANALYSIS	6
Mission and history	6
Organizational structure.....	6
Programs and services.....	7
Community partners.....	8
Focus group and survey findings.....	8
Existing brand identity	9
Existing marketing and communications tools	10
Opportunities and challenges.....	12
CORE COMMUNICATIONS STRATEGIES AND TOOLS	14
City Club audiences	14
City Club key messages.....	16
Overarching marketing and outreach goals.....	16
Earned media strategies and tools	17
Brand identity strategies and tools.....	19
CIVIC ENGAGEMENT MARKETING CAMPAIGN	22
Civic engagement marketing campaign strategies and tools.....	22
NEW MEMBER CAMPAIGN AND MARKETING PLAN	24
New member campaign strategies and tools.....	24
Member retention strategies and tools.....	29
FUNDRAISING PLAN	30
Introduction	30
Fundraising situation analysis.....	31
Resources and assets	31
Fundraising tools	31
Obstacles and opportunities	31
Economic/fundraising climate in Portland	32
Competitors and collaborators	32
Fundraising goals	33
Fundraising audiences.....	33
Approach	33
Fundraising infrastructure.....	34

Key cultivation strategies.....	36
Fundraising tools.....	40
Recognition strategies.....	41
PLAN BUDGET AND TIMELINE.....	42
APPENDICES	43
Appendix A – Model campaign pyramid.....	43
Appendix B – Three-year timeline.....	44
Appendix C – Focus group and survey results.....	45
Appendix D – Implementation budget.....	56

ACKNOWLEDGMENTS

Metropolitan Group would like to thank City Club's Board of Governors, staff, members, volunteers and other individuals who participated in meetings, discussions, focus groups and surveys for this planning process.

Special thanks is extended to Executive Director Wendy Radmacher-Willis, Immediate Past President Andrew Linehan, President Korleen Kraft, Governor Susan Kelly and staff members Cullen Brady, Wade Fickler and Tim Krause for their assistance in developing this plan.

EXECUTIVE SUMMARY

In April 2004, City Club of Portland engaged Metropolitan Group (MG) to develop a plan of strategic recommendations that would:

- Help the Club grow, diversify and retain its membership;
- Create a stronger identity for the Club in the Portland region;
- Enhance programs and services to members and the community; and,
- Expand sources of funding and create a stronger development infrastructure.

During the past three months, MG worked with City Club staff, board and volunteers to conduct a detailed audit of City Club's organizational activities, membership services and programming over the past decade. MG also worked with City Club members, former members and nonmembers from the Portland community to learn their opinions, perceptions and ideas about the Club and its future course.

MG's primary goal in this project has been to give City Club a solid plan to achieve the objectives stated above and to provide a clear understanding of how to implement these recommendations.

This extensive process of research and strategic development led Metropolitan Group to draw the following key conclusions about City Club's current situation:

1. The community's awareness and understanding of City Club's brand – as communicated through its messages and visual identity – is strong, but not deeply rooted or aligned with the Club's evolving voice and personality.
2. Research and Reports, followed by programming, are highly valued.
3. The Club's mission, vision and leadership are well aligned to connect with important civic needs that exist in the community.
4. Recruitment in communities of color and among younger members is a significant challenge and will require expanded engagement in those communities.
5. Fundraising and marketing programs have strong staff and volunteer support, and recent expansion of these areas has had a positive impact on the Club's visibility. These programs are challenged by limited infrastructure, limited diversity of giving (current gifts are predominantly individual annual gifts and small corporate gifts) and limited staff/volunteer capacity.
6. The best fundraising opportunity for the Club will include a combined campaign of new programs; cultivation of major donors, grants and planned giving; and a more robust Annual Fund with steadily increasing revenue goals.

Based on these conclusions, Metropolitan Group recommends that City Club implement the following major recommendations:

1. Refresh City Club's brand to better reflect the Club's expanding vision and relevance, and produce new communications materials in conjunction with the Club's move to a new space.
2. Plan and implement a comprehensive membership, marketing and fundraising campaign that includes the following major components:
 - a. An annual spring campaign designed to build stronger awareness and engagement of civic issues through blockbuster programming, extensive media coverage and direct outreach. A key outcome of the campaign is to significantly increase the community's awareness, and depth of understanding, of City Club.
 - b. An aggressive three-year drive to increase membership to 3,000 through peer cultivation, engagement of professionals in the business community, direct outreach to target audiences, and stronger partnerships with diverse communities of color.
 - c. A three-year, \$1 million fundraising campaign designed to invest donors in City Club's new vision and enhanced programming. Immediate fundraising needs include:
 - Developing a detailed campaign structure, case statement and prospect list
 - Securing volunteer leadership
 - Cultivating challenge grants to encourage major and new gifts
 - Implementing a refreshed Annual Fund with stair-stepped goal increases over three years
 - Seeking major individual gifts (with multi-year pledges)
 - Energizing the Club's planned giving program and cultivating new endowment gifts
 - Cultivating corporate and foundation grants for new projects and initiatives

SITUATION ANALYSIS

MISSION AND HISTORY

For 88 years, City Club of Portland has helped to shape the growth of our city and the history of Oregon. The Club has a rich history that is rare in American cities. It is an organization that has provided wisdom, knowledge and a platform for citizens to reflect on their past and imagine their future. Since 1916, City Club has been a major source of lively ideas and civic engagement.

City Club's mission is to inform its members and the community in public matters and to arouse in them a realization of the obligation of citizenship.

Today, City Club remains a vital component of Portland's civic life. From member-produced research and ballot measure reports to Friday forums and political debates, from issue committees and task forces to special programs and events, City Club is an organization that inspires citizens to create change.

At the heart of this plan's recommendations is a thoughtful and conscious effort to develop the messages, opportunities, resources and tools that will connect more of our community to the Club's history and mission, while helping to strengthen the social contract of citizens across our region.

ORGANIZATIONAL STRUCTURE

City Club is a 501(c)(3) membership-based organization. The Club currently has approximately 1,300 members. This marks a decline from the Club's peak of just over 3,000 members in 1985. The Club is governed by a 16-member board and staffed by an executive director, research director, communications coordinator and executive assistant. Several member-based volunteer boards and committees manage the Club's operations, programs and activities. The Research Board directs the Club's research, resolution and report activities. The Advocacy Committee directs Club policy on advocating for positions on issues that are adopted by a vote of the Club membership. The Programming Committee directs the content and scheduling of Friday Forums and other Club programs and events. Six issue committees meet regularly to discuss a broad range of public issues. Other committees exist for the annual fundraising drive, Club finance and membership recruitment.

PROGRAMS AND SERVICES

The Club provides a valuable range of information, opportunities for engagement and civic discourse on issues that are important to our city, region, state and country. The Club even addresses issues of global significance that have a far-reaching impact on our community. Following is an overview of City Club programs and services.

Research and reports

City Club members conduct credible and balanced research on major issues affecting Portland, the region and the state. The Club's research is an important resource for community leaders, active citizens, students and the media. City Club research is conducted and written by members who are carefully screened for conflict of interest. City Club focuses on three kinds of research reports:

1. **Long-term study reports** present background information, findings, analysis, the study committee's conclusions, and recommendations targeted to relevant decision-makers and organizations. Example: Affordable Housing in Portland.
2. City Club **ballot measure studies** help citizens make sound voting decisions. Ballot measure reports include objective background information, a summary of pro and con arguments, analysis, conclusions and a voting recommendation. Example: Multnomah County Ballot Measures 26-51 and 26-52: People's Utility District (PUD).
3. **Information reports** raise awareness of matters of public importance, but do not lead to City Club policy positions. Example: Building a Sustainable Future for Portland.

Advocacy

Following a public debate after the release of a long-term report, City Club members determine by vote whether the study committee's conclusions and recommendations should become official policy positions of the Club. Once a position is established, City Club Advocacy and Awareness committees work to advocate for the implementation of recommendations by educating and informing club members, citizens and decision makers.

Forums and events

From speeches by government, civic, cultural and other leaders to various panels on the arts, education and technology, Friday Forums engage lunchtime audiences in issues of significance, prominence, urgency and humanity. City Club forums guide citizens in the ways of civic affairs, giving complex subjects relevance and clarity. City Club also hosts debates for most elected offices in the region. Forums are rebroadcast on cable television and on Oregon Public Broadcasting radio for the statewide community.

In addition to flagship Friday Forums, City Club of Portland sponsors a variety of forums and events giving members and friends of the Club an opportunity to engage with one another around civic issues. Examples include town hall meetings, special evening events, Citizen Salons, New Leader Forums and Citizens Read book discussion groups.

Member issue committees

Issue committees offer an excellent opportunity for a great volunteer experience in the City Club and active involvement in our community. The issue committees meet the needs of Club members by offering flexibility, relevance, and immediate responsiveness to issues. The Club has six issue committees that meet on a regular basis to discuss topics of importance to our metropolitan region. The committees include: Arts and Culture; Education; Growth Management and Environment; Health Care; Public Services and Safety; Technology and Business.

COMMUNITY PARTNERS

City Club engages a number of partners in the community to produce programs, conduct research and inform voters. Partners include the League of Women Voters, The Bus Project, Slow Food Portland, World Affairs Council, Coalition for a Livable Future, Oregon Council for the Humanities, Oregon Historical Society, Willamette Week, Oregon Public Broadcasting, Portland Community Media, TriMet and many others.

City Club also engages corporate sponsors for its Friday Forums on a quarterly basis. Sponsors include CH2M Hill; PacifiCorp Foundation; Shiels Oblatz Johnson; Schwabe, Williamson & Wyatt; PGE; ShoreBank Pacific; Pope & Talbot, Inc.; Kaiser Permanente; PacifiCare; Zimmer Gunsul Frasca Partnership; Standard Insurance; and Washington Mutual.

FOCUS GROUP AND SURVEY FINDINGS

Metropolitan Group conducted two focus groups and two online surveys among target audiences to test and identify how the City Club is perceived, what people find favorable and unfavorable about the Club, what they perceive to be the benefits of membership, and assess trends in membership and giving over the past four years. A complete report of the focus group and survey findings is located in the appendices. Following are the main findings that MG learned from focus group and survey participants:

Perception and role of the Club

- All participants surveyed knew what the City Club generally did and felt positive about its role in the community.

- Among nonmembers, common perceptions were that the Club is exclusive, has an “older” membership, and lacks diversity.
- Several participants from all groups stated that the City Club needs to engage communities of color, lower-income citizens and people of diverse political views.

Programs and services

- All groups surveyed, including nonmembers, ranked research and reports as the Club’s most valuable program.
- Most members said that the City Club is great for networking and engaging with others to discuss civic issues.
- All members and former members stated that Friday Forums and other programs are fun, interesting and worthwhile. Many former members claimed that the reason they left the Club was because they did not have time for these activities.
- All groups surveyed provided neutral responses to issue committees except for two members who stated that the issue committees were not engaging and that they would be more effective if committees were allowed to break out of current categories, and organize and disband in a more organic fashion.

New public storefront space

- Members, former members and nonmembers all agreed that the concept of a new public space was exciting and all stated that it could be successful.
- The majority of participants had concerns about the cost of a potential public space and the amount of resources and staff that would be needed to maintain it.
- A few members stated that they were afraid of a storefront space attracting the homeless and other people off the street.
- Many members also stated that they did not want the space to compromise the Club’s impartiality by being used for commercial or partisan purposes.
- Some nonmembers stated that they did not understand who the space would appeal to, or who the City Club would want it to attract. One person asked, “Will it become another Christian Science Reading Room?”

EXISTING BRAND IDENTITY

City Club’s existing mark and brand identity is more than a decade old. A standard “City Club blue” is used on most materials and communications. The mark is a simple Portland

skyline of recognizable buildings constructed in the 1970s and 1980s. The mark is composed of geometric forms and justified Roman type. It evokes a sense of generic stability. It could easily be the logo of a bank, real estate or insurance company. The Club does not currently utilize a standard typeface in documents or a set of brand guidelines to maintain consistency among its materials.

The Club most frequently uses its mission statement as a key message. When other messages are used, they are generally inconsistent and range from “the conscience of the city” to “City Club is more than just Friday Forums.” This leads to subtle shifts in message delivery among a broad public audience that ultimately makes City Club’s brand identity less defined and effective than it can be in the marketplace. The Club’s current brand does not communicate the mission, character or messages that we have observed in our research. The brand does not communicate that the Club serves as an unbiased forum for civic engagement that is open to all people.

EXISTING MARKETING AND COMMUNICATIONS TOOLS

City Club uses the tools below to provide information to members and the public, to reach new audiences and to develop new resources. Throughout this plan, Metropolitan Group will refer to how these materials may be more effectively used to implement new member recruitment, marketing and fundraising strategies, and we make recommendations where appropriate for revisions to these tools or the addition of new tools that may be needed to achieve Club goals.

Bulletin

The *Bulletin* is published in print and online and features a cover story about that week’s Friday Forum and news about upcoming Club activities. The *Bulletin* serves as the main source for news about Club members and includes announcements about elections and Club business, “welcome” listings of new members, “in-memoriam” listings for deceased members, and updates about member-based issue committees. The *Bulletin* also provides information on City Club positions and research reports and solicits members for new research studies. The *Bulletin* is sent to a broad audience beyond Club membership, yet it does not directly convey key messages about the Club on a regular basis. The *Bulletin*’s layout is inconsistent and changes according to the spatial needs of copy and images.

Website

The City Club website has become a primary communications tool for the Club in recent years. The site features most of the information published in the *Bulletin* plus information about the Club’s programs and activities, governing boards, staff, a Club calendar and downloadable files of recent Club reports and recorded programs. The website is probably the Club’s most effective tool because of the depth of information and timeliness that it provides to audiences who are looking for fast access to information.

Annual report

City Club publishes its annual report each spring and uses it to highlight initiatives and activities of the year. It provides a full listing of research reports, resolutions and publications from the year, as well as a complete listing of the year's programs and events. The annual report also reports on Club financials, fundraising and membership activities. Reports in recent years have also adopted a particular theme to shape the look and feel of the report, but these themes are only generally touched upon as content.

Membership directory

City Club publishes an annual directory of members. It is an important benefit of membership and is a valuable networking tool for members. This publication is difficult to keep current and is costly to produce, both in staff time and budget.

Membership brochure

City Club publishes a general barrel-fold brochure that describes the benefits of Club membership and includes a remittance card for joining. While the membership brochure is informative, the content is difficult to absorb. Long lists of programs, activities and member benefits obscure messages about what the Club is and why it is important. Membership dues options and costs are broken out across two panels, one detached, making it difficult to decipher at a glance how easy it is to join. The current brochure does not effectively communicate strong messages about the Club.

Special series brochures

These brochures are relatively new additions to City Club's materials and feature information about special events, such as Citizen Salons. The brochures are currently doing the best job in communicating messages about the Club. They provide a welcome relief from City Club's standard color and convey information about City Club's more adventuresome activities.

Research, information and ballot measure reports

City Club reports are a cornerstone of Club activities and become permanent historical documents. Their quantity varies annually depending on the work conducted by research committees. Several hundred hard copies are printed and distributed throughout the state and nation. The reports are also converted to PDF documents and are available for free download online. While City Club's printed research is not intended to be a primary marketing tool, it is often the recipient's first or only connection to the Club. Currently, the reports communicate very little about the Club. Report layouts tend to be difficult to read, stylistically inconsistent and visually cluttered.

Signage

City Club utilizes podium signs and name cards at Friday Forums and has used banners in the past when needed for special programs or activities. The podium signs are especially important because they communicate the Club's logo to television audiences.

OPPORTUNITIES AND CHALLENGES

Following is a list of opportunities and obstacles that Metropolitan Group identified based on our conversations with staff and members, focus group and survey participants, and our review of Club organizational information and materials.

Opportunities

- As in many cities in America, Portland citizens are faced with a cultural divide between private and public life. Fewer and fewer people are engaged in public life and the affairs of civic discourse. Yet, we are also at an important turning point where the course of several major public issues will permanently shape our future. City Club has an important opportunity to engage citizens in open discourse about these issues.
- City Club's strong history of civic involvement in Portland is an asset. Many stories can be told about how City Club has been a voice of change in Portland for nearly a century.
- Strong programs and research activities continue to be the Club's greatest asset. City Club members are addressing important issues.
- City Club produces timely reports and recommendations, but could do more to promote its findings and advocate for its recommendations.
- City Club has the opportunity to expand its role as a nonpartisan objective resource. One of City Club's great assets is its approach to policy, research and informing the public.
- City Club is experiencing strong momentum from new activities – Candidates Gone Wild, Citizen Salons, Citizens Read Book Group, New Leaders Council and True to the Food series are all new forms of programming that are exposing more people to City Club.
- City Club maintains a high level of membership among community and business leaders, even though they are not attending Club activities as often as in the past.
- City Club has already begun producing exciting new programs and opportunities for members. The Club has the opportunity to build on this momentum and create even more opportunities to engage members and the community in innovative new programming and initiatives.
- The population of 25- to 40-year-olds in Portland is growing faster than the national average.
- City Club's move to the Governor Hotel will make Friday Forums more accessible to downtown residents and employees.
- The Club's plan to move into a downtown storefront space creates an opportunity for greater public interaction, partnerships and visibility.
- City Club has an opportunity to build stronger relationships with media outlets seeking nonpartisan voices and opinions.
- City Club has a highly skilled and committed staff and a broad base of volunteer member support.

- The Board of Governors made a strategic choice in hiring the current executive director to move the position from an organizational administrator to an executive leader. This shift in the role of the key staff position gives the Club an opportunity to energize its membership, build a stronger presence in the community and aggressively implement new marketing and fundraising strategies.

Challenges

- The Club's core membership is aging. New recruitment is needed to build the next generation of City Club members and leaders.
- There is a lack of involvement by mid-career professionals and other citizens who traditionally have an interest in civic affairs.
- The Club's diversity strategy from the past decade failed to retain the members it recruited.
- Many nonmembers perceive that City Club is hard to get involved in and that members come from an exclusive social class of wealth and power.
- City Club should conduct more outreach to reengage community and business leaders in Club activities and to cultivate the direct support of CEOs and corporate leaders.
- The City Club is perceived as not having a strong presence or relevance in communities outside the downtown core.
- The City Club's current offices are isolated. The public does not see a regular City Club presence outside of Friday Forums.
- Partnerships and sponsorships with other organizations are not fully utilized to identify and engage the partner's constituents as potential new members.
- The Club's recruitment efforts at current programs (such as Candidates Gone Wild) are not as strong as they could be. More could be done to capture information from audiences and provide follow-up with more details about membership.
- City Club is often perceived as a place to go to a lunch every once in a while, to hear some one speak. The community is not informed about all of the things that City Club offers.
- City Club budget is based upon current programming and membership size. The Club will need to secure new sources of long-term funding to support expanded initiatives.

CORE COMMUNICATIONS STRATEGIES AND TOOLS

Following are the fundamental audiences, messages, strategies and tools that City Club should utilize to develop communications for all initiatives, campaigns, programming and materials. We have included all of the general marketing recommendations prior to the membership campaign and fundraising sections since both of the later sections will benefit from and leverage the overarching marketing efforts.

CITY CLUB AUDIENCES

MG identified three major audience groups served by the Club. Expansion and cultivation of these audiences will be important for meeting City Club's strategic goals in the next three years and they will be the primary recipients of the messages, strategies and tools that this plan proposes. Each major group is broken into subgroups below.

City Club will use specific strategies and tools to reach each of the audience groups identified below. To build membership, public awareness and new resources, the Club will need to meet the needs of each audience segment in the most comprehensive, efficient and timely manner possible.

Member audiences

1. Current members
2. Former or lapsed members

New member audiences

1. Professionals
 - Employers of City Club members
 - Businesses with corporate headquarters located in the region
 - Employees, management and leaders located in the city
 - Mid-career managers
 - Business owners and entrepreneurs
 - Business owners and entrepreneurs from communities of color
 - Small business owners and employees
2. Major communitarians and prominent citizens
3. Active political, social and cultural leaders
4. Well-educated stay-at-home professionals
5. Active and engaged retirees
6. College-educated, middle-to-upper-income citizens who live in the city

Marketing and outreach audiences

1. Partner organizations
 - Program and event partners
 - Corporate sponsors
 - Research and election partners
 - Community outreach partners (neighborhoods, targeted communities)
 - Other city clubs nationally and internationally
2. Media
 - Broadcast partners (OPB, cable television)
 - Media sponsors (print, electronic, outdoor/transit, Web)
 - Earned media and editorial media (print, electronic, Web)
 - a. Daily print
 - b. Weekly print
 - c. Special interest reporters/publications
 - d. Editorial boards
 - e. News radio
 - f. TV news
 - g. Community Access TV
 - h. Partner newsletters/publications
 - i. Targeted national media (for unique news or feature story opportunities)
3. Elected and government officials
 - City and local
 - State and regional
 - Congressional delegation from Oregon and SW Washington

Fundraising audiences

1. Business – Major employers in the region, mid and small business within the central city and professional firms.
2. Foundations – Multiyear capacity requests to major foundations. Initiative and project-specific requests to mid-level and small foundations.
3. Major gift donors – Targeted City Club members and other appropriate individuals (communitarians).
4. Supporters – All Club members.
5. Planned giving – Club members and lapsed long-term members.

CITY CLUB KEY MESSAGES

Metropolitan Group tested 10 messages among the focus group and survey participants. Our goal was to determine the effectiveness of each message in connecting with the values and interests of the participant. These messages were of varying length and meaning and have been used by the City Club in the past or at present.

By analyzing the results of these tests and through discussion at several points in the development process of this plan, MG identified three messages that we believe are at the heart of what City Club does. The delivery order of these messages and the way in which they are conveyed (story, quote, testimonial, etc.) will depend on the audience that you are engaging.

1. **City Club provides unbiased research and compelling programs that connect you to the most important ideas, issues and leaders of our time.**
2. **City Club promotes civic engagement and active citizenship to build a stronger community.**
3. **City Club is open to everyone who wants to interact with other citizens and shape the future of our city and state.**
4. **City Club is an open and neutral forum for many diverse voices.**

OVERARCHING MARKETING AND OUTREACH GOALS

Metropolitan Group identified that the following goals were of primary importance to City Club's marketing and outreach efforts in the next three years. These include goals for both increasing Club membership and in building greater public awareness of the Club's mission, programs and services.

Goal One – City Club will increase and retain a membership of 3,000 persons by 2007.

Goal Two – City Club will effectively inform target audiences about the many benefits of Club research, programs and membership and create opportunities to engage them in these activities.

Goal Three – City Club will strengthen public perceptions and attitudes about the Club's purpose and values.

Goal Four – City Club will enhance its programs and services to better serve its members and the community.

EARNED MEDIA STRATEGIES AND TOOLS

Local, regional and statewide media are key audiences for the City Club that need to be engaged to achieve the goals established in this plan. While City Club currently has strong broadcast partners and has been successful at building relationships with many reporters and members of the media, MG recommends that City Club create tools and implement procedures that will make your media relations more proactive. By actively seeking to increase media outreach, City Club will make a greater impact on the community by educating more citizens about timely issues and the value of membership.

City Club's media strategy can be divided into four areas of focus:

1. Earned media for Club research, reports and ongoing programs
2. Op-ed and point-of-view editorial outreach on issues in the news
3. Sponsored media for special programs and campaigns
4. Partnered media for broadcasts

MG's recommendations are designed to help City Club deliver information to the media in a timely and strategic manner, plan effective media timelines to increase coverage and placements, and help the Club build relationships with potential media sponsors.

Earned media tools:

1. **Annual media relations timeline:** MG recommends that City Club staff work with members to plan an annual media relations timeline that identifies times in the year when media will be needed for reporting news resulting from Club activities, for telling stories about timely issues, and for sponsorships of Club activities. The following items will be important components of City Club's annual media timeline:
 - Target and plan new report and study pitches annually.
 - Plan regular ongoing announcements of new programs, projects and partnerships.
 - Plan editorial board visits for print publications and broadcast editorial directors.
 - Identify opportunities throughout the year to pitch interesting feature story opportunities to relevant media and reporters.
 - Identify opportunities throughout the year to provide op-ed pieces and weigh in on major issues in the news with which City Club has a relevant point of view.
 - Identify programs and initiatives that will require media sponsors and plan approaches.
2. **Monthly internal editorial meeting:** MG believes that the City Club would gain a stronger presence if the Club functioned more like a media entity, which it already does somewhat by printing reports and producing television and radio content. Key

staff and members should conduct a monthly editorial meeting to discuss upcoming and current projects, analyze external forces (items in the news and key issues), identify trends and select priority stories for pitches to the media, feature placement on the City Club's website, use of e-mail updates and placement in the *Bulletin*. This session will integrate communication across program areas such as research, forums and events and issue committees.

3. **Media database:** MG recommends that the City Club's communications staff audit and, if necessary, update its media contact database to include all up-to-date contacts in the following areas:
 - **Regional journalists:** This segment includes political journalists, editorial journalists, columnists and investigative journalists.
 - **Issue-specific journalists and freelance columnists:** This segment includes journalists and reporters focused on specific issues.
 - **Editors and producers:** This segment includes editorial directors, news editors, issue assignment editors and broadcast producers.
4. **Media kit and releases:** City Club should develop standard media kits and releases for story pitches, study and report pitches, major campaign announcements and special events. Media kits would include a custom-designed folder; business cards; background sheets detailing the history of the Club, information on City Club's mission and the Club's key messages; news releases and information specific to the issue.
5. **Media training:** MG recommends that City Club's leadership, executive director, research director and communications coordinator receive media training to improve their skills at pitching and communicating with all kinds of journalists, reporters and broadcast media.
6. **General guidelines:** City Club staff should develop general communications guidelines that will assist staff and members with determining how to handle media requests and procedures for delivering information to reporters. These guidelines will also include a checklist that can be used to evaluate what is needed for new City Club projects and how to identify opportunities and partnerships.
7. **Public spokespersons:** In response to the media's frequent use of expert "spokespersons" in reporting news, MG recommends establishing primary and secondary spokesperson roles for staff. We recommend that the executive director become the organization's primary spokesperson and that board/committee leadership serve as subject-specific spokespeople, and as the key spokespeople on areas of governance. The research director should serve as a secondary spokesperson when needed. In similar research and policy organizations, more than one-third of the main director's time is dedicated to acting as a public representative of the

organization. Wendy Radmacher-Willis' knowledge, experience and communications abilities are a valuable City Club asset for outreach and positioning with the media.

BRAND IDENTITY STRATEGIES AND TOOLS

Metropolitan Group recommends that City Club begin a process to develop a new multidimensional brand strategy that will better communicate the Club's mission and messages, while creatively responding to the market environment in which it competes. City Club should act now to build a brand strategy that unifies the Club's name, potential taglines, its visual identity and its key messages. The resulting brand will serve as a fresh, clear communicator of City Club's messages and personality to target audiences, and will serve as a powerful tool for the Club's new member campaign, marketing initiative and fundraising campaign. At present, the Club's visual brand identity is more of a liability than an asset by re-enforcing messages that the club is working to counter. The club's name recognition is high enough that a switch in visual identity will create minimal brand equity risk.

If City Club decides to change its brand identity, it would be prudent to make the change now. Because the Club has decided to change locations, all Club materials must be reprinted. This presents the Club with an excellent opportunity to reprint its materials with strategic new messages and a fresh appearance.

If the Club decides to not change its existing brand's visual identity, it will still benefit by incorporating the new messages to refresh and strengthen the brand.

Brand identity tools:

1. **Internal style and brand identity guide:** City Club's new identity will be a valuable asset and powerful tool. To help maintain the Club's brand strength, Metropolitan Group recommends that the Club create a style guide for the Club's logo and branding materials that establishes how to use these materials clearly, effectively and consistently. This guide will help members and staff understand the approach behind the Club's new identity and its relation to the Club's communications goals. It will offer clear style usage guidelines for applying the Club's new brand in all parts of the organization.
2. **Mark and logotype:** MG recommends that the Club redesign its mark and logotype to better reflect its communications goals and messages. The Club's new logo should be applied to the design of the new collateral materials recommended below.
3. **Collateral materials:** Based on our analysis of City Club's work and communications needs, MG recommends the following basic materials for branding your identity. Each will maintain the consistency of your brand while bringing out unique design treatments that meet the needs of your targeted audiences. The

elasticity of the design across your materials (i.e., its ability to be consistent while also incorporating subtle changes and variations) will make your materials distinct and invigorate the overall look of your brand with a feeling that is dynamic.

- **Stationery system:** City Club's new stationery system should include letterhead, envelopes, business cards, mailing labels, a standard press release letterhead, a two-pocket presentation folder and electronic versions of all letterhead.
- **Basic brochure:** A basic walking/talking branding tool should be created to express who the Club is, what it does and how people get involved. This piece should be simple and less expensive so that it can be used for a wide range of purposes, especially for new member recruitment, marketing and fundraising.
- **New member brochure:** A new member brochure should be designed to incorporate the messages, benefits, and options discussed in the new member campaign strategy.
- **Presentation brochure/carrying case:** This piece should serve a dual purpose as a large format color brochure and presentation folder with a pocket for reports, case statements, news releases and other documents that you wish to send to specific audiences. This piece will be useful to send to sponsor prospects, major donors, high-profile leaders and important media contacts.
- **Annual report:** We recommend creating an annual report that not only provides vital annual data about the Club, but that also serves as an example of City Club's civic work and as a branding and outreach tool. The report should be designed to feature information, stories and professional quality images that focus on important issues that City Club members addressed in that year. For example, the Club might use the annual report to provide a feature story about a particularly important issue that emerged in Club research or programs throughout the year. The annual report should function to make the case of City Club's impact and relevance to both existing members and to funders and prospects. It could feature more stories and photographs that highlight members and their efforts, while communicating the personality and values of the Club.
- **Redesigned *Bulletin*:** City Club should design an inexpensive and visually simple weekly *Bulletin* with standardized templates and guidelines that make it easier to fit changing information into a consistent style.
- **Research reports and studies:** City Club should utilize a professional graphic designer to create standard report templates that communicate the brand identity of the Club and effectively present a report's detailed analysis and information graphics in a clear, professional and elegant manner. It

would also be useful to include a page at the front of each report that more effectively describes the mission and key messages of the Club.

- **Signage:** City Club should design new signage suitable for events at a variety of locations, especially for the windows and ideally the sidewalk of the new storefront space. Signs for Friday Forums and other programs including podium signs and tabletop name cards should be improved for stronger visual presence on television.
- **Membership directory:** MG recommends moving away from a printed directory in favor of an up-to-date online version in a members-only section of the City Club website. Because all members may not have Internet access, the Club should continue printing a limited number of copies annually for those who request it. We recommend limiting the production and cost of these because of their relatively short lifespan.
- **Website and online communications:** City Club's website should be redesigned with the Club's new brand guidelines and stronger use of messages and stories that convey the City Club identity to nonmembers and the broader community. New features should be added that improve the site for the Club's target audiences.
 - A large portion of the home page (visible without having to scroll down), and a new page linked to the home page, should be designed for prospective members. This space would feature benefits of membership, incentives to join and an immediate way to register for membership and for incentives online.
 - A robust members-only section that is password-protected should be created. This section should feature a constantly growing range of customizable online tools for members such as customizable calendars of Club activities, downloadable calendars for PDAs, a current membership directory with member-created customizable profiles, member mailboxes, downloadable meeting minutes, member recruitment tools, city club power point presentations, members-only incentives, online event registration, membership renewal, member account information and more. The ability to select preferences and receive targeted e-mail announcements for programs and activities should be included.
 - A newsroom should be added to the website that includes key messages for the media, all news releases, publicity images, contact information for staff, committee contacts, links to reports and other important media resources.
 - A public discussion board should be created and moderated by staff or a committed member with threads on different issues that are important to Club members and the community.

CIVIC ENGAGEMENT MARKETING CAMPAIGN

City Club will achieve greater results in pursuing its membership, public awareness and fundraising goals if it initiates all of these efforts under a major marketing initiative that communicates what City Club is really all about – *engaging issues*.

Everything from securing media sponsors to involving communities of color to cultivating major individual and foundation gifts will be more successful if City Club organizes a campaign that is not about the City Club and its needs, but about the community's need to rebuild a shared sense of civic obligation and involvement in determining the future. City Club has the opportunity to be a leading force in eliminating divisions between citizens and building the leaders and ideas that will give citizens a voice against the “winner-take-all” political divide that keeps us from achieving positive change.

MG recommends that City Club initiate a major three-month public outreach campaign that focuses attention in Portland on the obligations and opportunities of citizenship. This campaign will help City Club's many audiences work together to reinvigorate the visionary spirit that makes Portland great.

The campaign will increase the exposure and impact of City Club in the media and among many grassroots groups and organizations. It also gives City Club an opportunity to leverage preexisting and new partnerships and to deliver key messages about City Club to thousands of citizens in our region.

CIVIC ENGAGEMENT MARKETING CAMPAIGN STRATEGIES AND TOOLS

To make the marketing campaign financially feasible, City Club will need to cultivate strong partnerships and sponsorships in the community. The following strategies and tools are key components of the campaign that should be defined and developed further among members of the Club.

1. Assemble a committee of members to manage the planning, marketing and execution of the campaign.
2. Create a campaign name, concept, messages and supporting creative elements. These should be developed to integrate with an updated City Club brand identity and with the materials needed for the new member campaign.
3. Develop a major springtime campaign launch that consists of a series of high-profile civic programs, celebrations and activities that occur over the period of several days or a weekend.

4. Secure media sponsors and community partners to help produce and promote all major public events.
5. Conduct a direct outreach strategy that includes primary mailings to key Club audiences and messages in secondary spring mailings to membership campaign audiences and annual fund prospects.
6. Conduct an earned media strategy that is focused on promoting the theme and events of the campaign. The strategy would include feature story pitches, op-ed letters, editorial board pitches, calendar and event listings, television visual opportunities and outreach to community newspapers.
7. Design a month of campaign-focused blockbuster/celebrity Friday Forums with media sponsors.
8. Develop a three-month calendar of special civic events, such as the Citizen Salons and other existing programming that can be branded with the campaign theme.
9. In partnership with community-based organizations, develop a series of forums that are held in the community to connect the theme of the campaign to issues and needs in communities of color.
10. Develop a program branded around the campaign that features several roundtable discussions led by community leaders on different issues. These roundtable discussions would happen simultaneously in the same space and time and provide a sample of what the City Club covers in a year. The program would allow participants to move from table to table and engage in many discussions. The idea of this concept is to create a very lively town-hall setting of many micro-conversations that, when viewed as a whole, reveal how connected different issues are and how important it is for us to work together to solve them as a whole. For example, a person might move from one table that is discussing how important it is to keep industry jobs in Oregon, to another table that is discussing the importance of preserving our environment, and finally to another table that is discussing what public schools need to prepare students for jobs in a creative and hi-tech economy.

Campaign tools:

This list should be developed further if the campaign is adopted for implementation.

- Campaign materials would include a brochure; posters; handbills/postcards; targeted letters and mailings; a new section on the City Club website; ads for print, transit and outdoor advertising; camera-ready ads and copy for partner newsletters and mailings; street banners for downtown; window displays; event signage and other items relevant to the final strategy and calendar of events.

- Proposals will need to be developed for sponsors, funders and potential partners. These would be developed in conjunction with other development strategies discussed in the fundraising section of this plan. Potential media sponsors might include The Oregonian, Willamette Week, Oregon Business Magazine, the Business Journal, DJC and others.

NEW MEMBER CAMPAIGN AND MARKETING PLAN

Metropolitan Group recommends that City Club develop the following strategies and tools to accomplish its goal to expand and retain its membership. It is essential that this process be strategic and focused, while also remaining flexible and responsive to our growing region and the dynamics of social/political change. These strategies will benefit from regular assessment by City Club's Board of Governors and executive staff to make them responsive to external forces. Critical engagement and flexibility is already an inherent characteristic of City Club's work and will be a strong asset for successful implementation of this plan.

NEW MEMBER CAMPAIGN STRATEGIES AND TOOLS

The campaign will last three years and will work in conjunction with the civic engagement marketing campaign defined in the previous section.

Oversight and management

1. Expand the Membership Task Force to include additional support for organizing events and to implement the strategies identified below. MG recommends recruiting two to three strong leaders who are capable of making strong public speeches, leading presentations and interacting with a broad range of people. Another effective option would be to recruit Club leaders willing to serve as advisors to the Membership Task Force who can assist with presentations and meetings when needed.
2. The Membership Task Force should develop an annual calendar of scheduled events and activities based on the strategy recommendations for this campaign and the broader civic engagement campaign.
3. The Task Force should develop a cultivation list of top new member recruitment prospects that will include individuals, businesses and organizations from the recruitment audiences identified above. This list will be used to track cultivation and outreach efforts on a regular basis.
4. Hold Membership Task Force planning meetings monthly. Regular agenda items should include a report on new members added, review of the new member

cultivation list to determine next steps for recruiting individuals and conducting business outreach and planning for scheduled events and activities.

5. Initially, the executive director should play a strong role in launching the campaign and participating in Membership Task Force meetings. Ultimately, City Club should plan for the phased addition of a full-time member services director. We anticipate this position being added in year two or three of the three-year campaign. Once hired, the member services coordinator will staff Membership Task Force meetings, provide management support for the new member campaign, implement regular member service enhancements, and support manage day-to-day member relations issues. The position will also support the Annual Fund as other areas of fundraising increase.
6. City Club should invest in a new database that is capable of managing all member-based activities, including membership renewals and mailings, maintenance of records and transactions, event registration and all aspects of fundraising. This will be a major investment of time and money for the Club that should be incorporated into the technology upgrade needs identified in the expansion fundraising campaign. Further description of recommended software providers is provided in the fundraising section of this plan.

Expanded membership incentives

1. Provide discounts for families and partners; for example, \$50 off the regular membership rate for additional memberships from the same family.
2. Provide opportunities for recruits to sample Club activities. For example, offer small presentations from notable speakers at quarterly cultivation events and allow nonmembers to “audit” research or issue committee meetings that are suitable for visitors. A “course listing” of sampler meetings and events could be published as a handout and should be online in the join us section.
3. Create a strong gift membership incentive. Offer a discount for multiple gift membership purchases. Print a limited edition gift card that features artwork by a prominent Oregon artist that can be featured in advertising and drive sales. Provide a gift-wrapped certificate and kit of new member materials. Advertise and promote with earned media the gift of membership in local holiday gift guides and develop a strategy to cultivate earned media. Push gift membership strategies during the holidays and graduation season.
4. Produce an annual high-profile celebrity event that is expensive to attend, but that includes a City Club membership in the ticket price. This is an excellent way to register a large group of new members in one major push who can then be a focused group for implementing retention strategies.

Expanded incentives tools:

- Create an enhanced new member kit that includes a welcome letter from the executive director, sample issues of the *Bulletin*, recent Club publications (within the past 3-4 months), a current annual report, tips on how to get involved, lists of upcoming research and issue committee activities that need volunteers, a City Club decal (see below) and pin, two free lunch passes for a Friday Forum and possibly other coupons or discounts.

New membership general marketing and direct outreach

1. City Club should cultivate media partners to support a major membership drive in the fall of each year of the campaign. Membership advertising should be secured with media partners as part of their agreement in sponsoring the broader civic engagement campaign. Media partners should be asked to provide display ads, feature articles, PSAs, outdoor advertising, Web links, etc.
2. City Club should push messages, member profiles and other stories through earned media, in partner newsletters, online, and with direct mail during the fall drive.
3. Staff should work with City Club's Web developer to highlight prospect member incentives on the main page and to build a page on the website specifically designed for prospective members that describes membership benefits, upcoming cultivation events, incentives, and that creates an easy way for prospects to immediately sign up to sample Club activities.
4. City Club should conduct targeted outreach to members of other respected membership organizations such as the World Affairs Council, Portland Arts and Lectures, OPB and Oregon Historical Society. Outreach could include a letter or mailing made possible through one-time list trades with partner organizations. Lists should be further sorted and targeted by zip codes that matrix with existing club membership to garner the highest response.

Peer recruitment

1. Create a campaign theme and make the goals of the campaign well-known among members. Provide regular updates and information in the *Bulletin*.
2. Provide incentives to current members to encourage them to recruit their family, friends and colleagues. Incentives may include gift certificates from local bookstores or restaurants, free lunch tickets to Friday Forums or donated items from in-kind partners.
3. Increase the discount incentive for guests of members at City Club programs and events.

4. Train members to recruit by providing them with cultivation tips and strong messages. The Membership Task Force should do this by conducting short presentations about recruitment at regularly scheduled committee meetings (research committees, issue committees, etc.) and by providing messages and tips in the *Bulletin* and on the website.
5. Membership recruitment stories and announcements should be made at every City Club program and event.
6. Organize quarterly membership cultivation events as a welcoming activity for prospective recruits and new members. These events should be hosted by the Membership Task Force or individual Club members and may include house parties, office receptions or special gatherings at local venues such as galleries, wineries, the Central Library or City Hall. These events should be offered at no charge.

Peer recruitment tools:

- Interview members to develop interesting stories about how or why they joined City Club and about amazing things that they have done as members. These stories may also be used in printed materials, online and in presentations.
- Create a new member campaign brochure that details goals, messages, incentives and reasons to become a member. This would replace the current standard membership brochure.
- Create new member campaign posters and/or banners for use in member offices and lunchrooms, Club offices and meeting rooms, and at events.
- Write recruitment messages and tips that can be used in printed materials, online and in presentations.
- Design and produce a new City Club lapel pin based on the Club's new brand identity. Give to all new members as an incentive and as a way of increasing awareness of City Club members.

Business recruitment

1. The Task Force should identify a list of key employers (companies that have significant numbers of potential members in their workforce) to approach as conduits of information to potential members. The Task Force should develop a list of options for how the employer can help drive membership. Some may be willing to help pay a portion of the employee's dues. At a minimum, the employer should be asked to help identify and reach out to employees by distributing a letter and City Club brochure for his/her employees that he/she will sign. For each company utilize connections that Club members and staff have to arrange outreach meetings with top executives, CEOs and directors. One or two members will attend these meetings and pitch the importance and relevance of City Club for that employer's management and mid-career professionals. The employer should be given a clear understanding of benefits

to his/her employees, such as increased knowledge of major community issues, access to policy makers and business networking opportunities.

2. To create a professional development opportunity for employees that also allows them to sample City Club firsthand, the Membership Task Force to develop a member speakers bureau that would visit businesses during the lunch hour and deliver on-site presentations and discussions on relevant and interesting civic issues affecting our region and the role of the City Club.
3. City Club should continue to offer five new memberships for employees of corporate sponsors. If feasible, the Club should also offer discounts on membership rates for all employees of major sponsors as an incentive for both sponsorship and for marketing club membership to sponsor's staff.
4. City Club should offer a small business "group sales" discount for five or more employees who want to become members.

Business recruitment tools:

- Develop a cultivation list of business prospects based on the business audiences identified earlier in this plan. Initial emphasis should be places on businesses located in the central city.
- City Club should also consider acquiring lists of professionals from local business associations and groups (Oregon State Bar, CPAs, planners, AIA, engineers).
- The Membership Task Force will write a standard recruitment letter template for businesses to customize and use internally to invite employees to join the Club.
- Club staff should design and print City Club decals that can be given to sponsors and supporting businesses for their windows and offices. These decals may also be the ones supplied to members for all-purpose use as indicated in the previous section.

Diversity recruitment

1. Conduct direct outreach to the leaders and management of major organizations representing communities of color such as the Urban League, Oregon Council for Hispanic Advancement, Hispanic Chamber of Commerce, Oregon Association of Minority Entrepreneurs, Portland Chinese Business Association, Coalition of Black Men and others. Outreach must be based upon seeking partnerships and conducting joint programming to engage issues that are critical to their constituents.
2. Conduct co-sponsored programs and consistently participate in community-based activities that co-brand and raise awareness of City Club.

3. City Club should consider offering discount memberships to members of partner organizations. Ideally City Club membership can be packaged as a benefit within other organizations outreach materials. Reciprocal promotion of their memberships to City Club members will be imperative.
4. Utilize list exchanges with partner organizations. Mailing and direct outreach will be more effective if it follows a period of joint programming, includes scheduled events in the future that demonstrate commitment and relevancy and if the offer is signed by a City Club member who is well known in the community that is receiving the mailing.

Individual recruitment

1. The Membership Task Force should invite elected leaders, philanthropic leaders, communitarians and top influencers in multiple social spheres (arts, sports, politics, healthcare, human services, etc.) from the region to become members. A list of these individuals should be developed and, as with business leaders, Task Force and advisory members should identify pathways and make direct personal calls to pitch membership.

MEMBER RETENTION STRATEGIES AND TOOLS

City Club's new member campaign will be most successful if it includes the following strategies to engage new members and foster their long-term commitment to the Club. In the beginning of the campaign, many of these strategies will need to be implemented by existing staff or members of the New Member Task Force, but eventually, a new member services director would take on management of those duties.

1. The Membership Task Force should develop a survey for new members that helps City Club staff and other members direct them toward programs and issues of interest. The survey would ideally be taken at the City Club website and the information would remain on file in City Club's member database for review by the Membership Task Force and others who are looking for volunteers to help with particular projects or attend specific events.
2. All new members should be contacted with a telephone call from a member of the Task Force to welcome them to the Club, answer any questions they may have and direct them to their areas of interest.
3. After six months, or an appropriate period of time that allows new members to settle into the Club, members of the Task Force should contact them once more via phone to find out if they are enjoying their membership and if they have any questions or concerns. Specific follow up to get the member more engaged (where needed) and a thank you note should follow the calls.

4. Extra effort should be made by the Membership Task Force to engage new members who have attended programs in their first six months of membership. The Task Force can help them make connections to other areas and activities of the Club.

FUNDRAISING PLAN

INTRODUCTION

City Club's ability to implement the strategies planned for membership recruitment, marketing the Club's civic voice, expanded public space and enhanced programming will require a packaged fundraising campaign designed to help potential funders understand and recognize the need for the following long-term vision to:

- Renew a shared understanding of the obligations of citizenship in our region;
- Restore a belief in our community that Portland is a special place to live;
- Revive civic engagement;
- Grow membership to 3,000 citizens;
- Provide meaningful programs focused on relevant and topical issues of the city;
- Share results and make an impact in the community that creates change.

This fundraising plan is based on the vision presented above and proposes to meet the needs of the Club through a three-year approach that will build new resources and infrastructure for all parts of the Club's programs, while also creating a stronger fundraising culture and base of knowledge among Club members and staff. The plan coordinates all development activities into a cohesive whole. It places a benchmark of where each area is today, sets specific goals for each year, and identifies the tools and tasks for implementation.

The plan will align and put in place all the tools and processes to efficiently and effectively move prospects to donors through five core elements of giving:

- Identify potential donors.
- Interest them in City Club.
- Inform them about the Club's mission and vision.
- Involve prospective and current donors, through meetings and cultivation events, with key staff and members who passionately bring the Club's mission to life.
- Invest – secure the gifts. When the development process is done well, potential donors will be asking, "How can I help City Club?"

FUNDRAISING SITUATION ANALYSIS

Resources and assets

City Club currently has an estimated annual operating budget of \$350,000. Two-thirds of City Club's annual operating revenue comes from membership dues with contributed income supplying most of the remainder. Most of these gifts are generated through the Annual Fund Drive comprised of individual gifts and corporate sponsorships. Last year's Annual Fund raised a record total of \$103,457. City Club currently has approximately 36 individuals who give \$500 or more annually.

Just under 20 corporations support the Club in any given year with sponsorships in the range of \$2,500. Program revenue has declined for several years, especially for the Friday Forum, and is currently losing slightly less than \$14,000 a year.

City Club currently uses reserves from its restricted endowment to cover annual operating shortfalls. This endowment was formed in the late 1970s when members raised \$150,000 through a combination of grants and contributions. The value of this fund is approximately \$350,000. A restricted trust from a planned gift currently yields approximately \$3,500-\$5,000 annually.

Fundraising tools

At present, City Club's primary fundraising approaches include the Annual Fund Drive, some minor planned giving outreach for the Club's Legacy Society and Corporate Sponsorships. Tools for these approaches include an Annual Fund brochure, customized corporate sponsor proposals and a Legacy Society brochure.

Obstacles

- City Club currently has limited staff capacity and resources to execute an expanded development program.
- The Club's fundraising infrastructure is primarily limited to ongoing Annual Fund activities, which have not focused on major gift cultivation or expansion of planned gifts and the City Club's endowment.
- The Club must also operate with a strong degree of fiscal caution so that expenses do not deplete the Club's restricted funds.
- The Club's fundraising database is managed with inefficient and outdated technology.

Opportunities

- City Club's greatest asset is its membership. The Club has a strong base of volunteer support to implement a large fundraising initiative.

- City Club has a number of fundraising pieces in place, such as extensive giving records, a planned giving infrastructure, a broad network of civic and philanthropic leaders, deep pathways to wealth and an excellent reputation for delivering essential programs and services.
- City Club staff leadership is optimistic, newly energized and skilled at building partnerships and cultivating resources.
- Major individual gifts from members and long-term foundation support are relatively untapped.
- City Club has a great opportunity to package a major fundraising effort with highly visible campaigns for new members, civic engagement and a new, more visible space.

Economic/fundraising climate in Portland

The current fundraising climate in Portland is heavily affected by political fundraising that will continue through the November elections. As a battleground presidential state with highly contested mayoral and city council races and with several major ballot measures (gay marriage, land use planning, school/county income tax), the political landscape is crowded. However, the importance of these issues to the electorate should reinforce the need for and messages of the City Club. Regarding major nonprofit campaigns, OHSU is currently well into a \$300 million campaign, the University of Oregon is in the early phases of a \$500 million campaign, OPB is in a \$15 million campaign, Portland Center Stage is in a \$28 million campaign, and the Ronald McDonald House is in the planning stages for an \$8 million campaign.

Regarding the economy, the major foundations' assets have recovered from the post 9/11 recession (though their use of trailing average spendout means that grant amounts will really start increasing in a year) and overall, donors seem to be cautiously optimistic.

Competitors and collaborators

City Club is the only unbiased and citizen-based civic organization of its kind in the region. City Club is also a model that new and old civic clubs in other cities work to emulate. While City Club competes against a broad array of cultural programs and policy research for public attention, it is the only organization that examines issues in order to advance civic engagement among diverse groups and opinions. More timely, objective and pluralistic views are needed in our community and City Club has the opportunity to lead the competition in energizing the foundations of democracy in the city.

FUNDRAISING GOALS

- Significantly increase City Club's fundraising results by increasing the amount of funds raised on an annual basis and conducting a targeted major fundraising campaign, with the combined goal of raising \$1 million by 2007;
- Establish a committed donor base that builds potential for unrestricted giving and insulates City Club from major revenue and funding fluctuations;
- Begin an individual major gifts program with the goal of significantly increasing the number of current major gift donors, and increasing the size and frequency of each gift;
- Secure increased sponsor support from corporations and capacity-building support from foundations;
- Enhance the ability of City Club's board of directors and staff to be involved in, and help meet, the organization's fundraising goals;
- Create the infrastructure for a long-term, sustainable fundraising program, supported by a computer-based donor information system to track donor cultivation, solicitation and gifts; and,
- Create a cost-effective fundraising structure while keeping cost-of-funds-raised at less than 20 percent.

FUNDRAISING AUDIENCES

1. Business – Major employers in the region, mid-size and small business within the central city and professional firms.
2. Foundations – Multiyear capacity requests to major foundations. Initiative and project-specific requests to mid-level and small foundations.
3. Major gift donors – Targeted City Club members and other appropriate individuals (communitarians).
4. Supporters – All Club members.
5. Planned giving – Club members and lapsed long-term members.

APPROACH

City Club will implement a three-year, \$1 million fundraising campaign to strengthen the Club's infrastructure, build financial security and provide enhanced programming and

services for an expanded base of members. Our approach to the campaign will be to focus efforts in the following three key areas with specific funding goals and targeted prospects. The goals included here are preliminary estimates that will be refined based on further development of City Club’s long-range strategic plan and budget.

OPERATIONS	INITIATIVES AND FACILITIES	ENDOWMENT
<p>Goal:</p> <p>\$125,000* – year one \$135,000 – year two \$150,000 – year three \$375,000 – total</p>	<p>Goal:</p> <p>\$325,000*</p>	<p>Goal:</p> <p>\$300,000</p>
<p>Funding sources:</p> <p>1. Annual Fund – major and supporting gifts 2. Corporate sponsors and corporate foundations</p>	<p>Funding sources:</p> <p>1. Foundation grants – \$225,000 2. Major gifts – \$50,000 3. Corporate sponsors – \$50,000</p>	<p>Funding sources:</p> <p>1. Current major gifts 2. Planned giving</p>

*Note: The 2004-2005 Annual Fund will be a combined campaign of \$125,000 for operations and \$50,000 for facilities. The campaign will be packaged and communicated to major donor prospects as an opportunity to support a new renaissance for the Club and will include naming opportunities in the new City Club space.

FUNDRAISING INFRASTRUCTURE

Staffing

Currently, Executive Director Wendy Radmacher-Willis spends an estimated 35-40 percent of her time on fundraising activities. This is likely to increase as she assumes primary staff responsibility for fundraising throughout this campaign. Her role will be to provide outreach to prospects, lead all internal fundraising efforts, and to work collaboratively with the Fundraising and Annual Fund committees.

MG also recommends that City Club contract approximately 15 hours per month with fundraising counsel. Fundraising counsel would provide support on selected donor outreach and major gift requests, write letters and grant proposals, conduct direct solicitation as needed, provide fundraising and strategic counsel, coach City Club staff and board members, as well as participate in Fundraising Committee meetings.

City Club’s communications coordinator will need to provide writing and layout design for various tools and documents needed for the campaign, such as sponsor proposals, cultivation letters and case statements.

City Club's executive assistant will need to provide data entry support beginning in winter 2004. As mentioned in the membership section, we are recommending adding a director of Membership Services in year two or three. This position will take over staff coordination of the Annual Fund and support the executive director in outreach to major gifts from members.

Fundraising Committee and management of the fundraising program

MG recommends that an expanded Annual Fund Committee oversee all components of the Club's development program. The committee will be staffed by the Club's executive director and ideally co-chaired by a highly charismatic and well-known leader (one from the community and a member of the Board of Governors). The committee should engage other members of City Club to help create pathways to major corporate and individual donors as described below.

City Club's Fundraising Committee should maintain the small-team structure that it currently uses for securing annual gifts of \$1,000 and under by assigning teams to different giving levels. A major gifts team should be created and will be responsible for large gifts to the Annual Fund and special projects. City Club's planned giving, or Legacy Society team, should be mobilized and chaired by a strong leader with the specific charge of increasing planned gifts. Finally, an event fundraising team should be assembled to plan and implement fundraising-specific events and to incorporate fundraising strategies into other targeted City Club programs and activities.

The committee will meet on a monthly basis to review a regularly updated prospect list, monitor cultivation strategies and assign outreach and "asks." This structure will keep the momentum going, ideally with 15 to 30 prospects always in active cultivation, with the process moving toward a request, and to move prospects from the stage of identification and introduction to active cultivation. Upcoming cultivation events will be discussed at each meeting and deadlines for corporate and foundation proposals will be reviewed. Opportunities for in-kind donations will also be reviewed.

Follow-up with individual prospects will be executed between monthly meetings by City Club staff, Fundraising Committee members and board members.

A suggested standing agenda for the Fundraising Committee meetings would include:

- Reviewing gifts received and ensuring proper stewardship;
- Strategizing pathways to reach new donors, including determining if any current donors may be used to reach potential prospects from their circle of contacts;
- Reviewing "ask" decisions pending and determining next steps for follow-up;
- Reviewing prospect lists and identifying next steps;
- Checking in on assignments of board, staff, consultants and volunteers;

- Reviewing plans for next month's cultivation strategies and making necessary adjustments;
- Reviewing a list of corporate and foundation proposals due and pending;
- Evaluating the previous month's efforts, capturing lessons learned and making recommendations for refinements;
- Guiding the efforts around major fundraising events, such as fundraising events during City Club's major civic engagement marketing campaign.

KEY CULTIVATION STRATEGIES

Case statement and prospect list

1. A strong case for support will be developed. MG has already begun to identify the key components of this case through this planning process. Further description of the campaign case statement is located below in the fundraising tools section.
2. City Club will develop a campaign prospect list that includes a full list of existing major donors and major gift prospects. These prospects will be reviewed in a prospect identification and qualification session with key members of City Club's Fundraising Committee, board and staff. Each prospect will be ranked according to their capacity to make a gift, their personal connection to the Club and the pathway, or person, that the Club will call upon to initiate a conversation. Use of list screening or selective prospect research (described below) will help create the strongest list.

Strengthen Annual Fund

1. City Club should develop campaign gift levels and associated benefits for the Annual Fund. Proposed gift levels are included in the recognition strategies identified below.
2. City Club should increase the overall Annual Fund goal incrementally over three years with a goal of \$125,000 in year one, \$135,000 in year two and \$150,000 in year three.
3. City Club should contract with a firm to wealth screen its member list or at minimum its major donor list.
4. MG recommends presenting matching gift messages in Annual Fund communications, as challenges are made by major donors and foundations.
5. MG recommends that the Annual Fund Committee send two initial mailings to all prospects – A kickoff letter in the fall and a follow-up letter/reminder in the winter months.

6. MG also recommends that City Club continue to utilize a spring special appeal letter that provides new incentive to give.

Seek new foundation support

1. MG recommends that City Club seek a lead, two-year, \$225,000 matching grant from Meyer Memorial Trust, the Collins Foundation or a combination of the two. The matching component should encourage major gifts by having a “gifts over \$X” component and encourage participation with a “new gifts/donors” component.
2. MG also recommends that City Club seek smaller grants for targeted initiatives or program development. An example is to seek funding from Murdock Charitable Trust for new technology upgrades and data-management improvements.

Establish major individual gifts program

City Club’s key to success in this campaign will be to secure new major gifts, especially three-year pledges based on the overall campaign, from longtime City Club members and supporters. MG recommends that a major gift team on the Fundraising Committee focus on implementing the following key elements of this strategy:

1. Appoint a respected and well-connected Fundraising Committee co-chair or honorary chair.
2. Establish a Leadership Council that directs major gift activities with Club staff and the committee chair(s).
3. Retain senior strategic fundraiser to advise on the campaign and cultivation process.
4. Develop an attractive case statement document and donor packet (see tools below).
5. Establish giving circles for major gifts at different levels.
6. Establish protocols of stewardship and recognition. Initial recommendations are available below.
7. Develop and maintain a donor prospect list and conduct sessions with key staff and committee members to identify donors, qualify their capacity to give and determine pathways for their cultivation. Fundraising counsel should help the Club conduct initial IQ sessions.
8. Committee members and staff should utilize existing City Club programs as cultivation events and customize a cultivation strategy (attendance at a program with a committee member as host, a meeting/presentation with the executive director and committee member, etc.) for each major donor prospect.

9. Presentations: Once prospects have been identified, committee members should conduct individual meetings in groups of two or three with the prospect, allowing two team members to observe the prospect while one person speaks. The ideal call team consists of City Club's executive director (who can passionately tell the Club's story), a City Club donor or leadership volunteer (who can speak to why they are involved and investing in the Club), and, where appropriate, a fundraising consultant or additional staff member who can assure follow up. All team members should be advised of their roles and briefed ahead of time.

Whenever possible, the meeting should be held at the prospect's office. Lunch meetings should be a last resort. Though effective for familiarization strategies, lunch meetings are not effective venues for solicitation because there are too many distractions during a meal. The meeting should last about 60 minutes, with the presentation limited to 20 minutes.

Planned giving and endowment

City Club should set a goal to increase its endowment by \$300,000 to support the future stability of the Club. To accomplish this, City Club will need to establish a team within the Fundraising Committee to develop an aggressive strategy for securing new planned gifts.

1. MG recommends that City Club enlist a chair for this team who is experienced in the planned giving process and in communicating the benefits and options of planned gifts. Peter Heuser would be our first choice for this role.
2. The planned giving team should develop a prospect list that consists of former members, long-time members and long-time donors. This list will be developed through an IQ process similar to the major gift prospect list identified above.
3. The planned giving team should develop a cultivation strategy specifically for individuals over age 70. Morning programs or other targeted events for members and lapsed longtime members can provide renewed connection and the opportunity to make the case for planned giving.
4. City Club should create a stronger brand for the Legacy Society and creating planned giving messages for all Club materials.
5. MG recommends that the committee develop and implement an outreach event for financial advisors and financial professionals who could present City Club in their portfolio of charitable and planned gift options for clients.

Corporate sponsorships

1. The Fundraising Committee and Club staff should work together to identify funding opportunities within all expansion projects and initiatives that would be suitable for corporate sponsorships. The Club should develop sponsorship opportunities,

investment levels, benefit packages (including refined existing packages and new packages), logistics for successful fulfillment, and prospect lists for outreach and cultivation.

2. Corporate sponsor cultivations should be managed by members of the Fundraising Committee's Leadership Council and the executive director. Pathways to key executives should be arranged with Club members when needed and appropriate.

Special projects

As City Club moves forward to renovate a new space, implement programming and new marketing initiatives and engage a new membership campaign, Club staff and board members should identify special fundraising goals and projects that can be connected to these finalized strategies. These should be determined once the core strategies of this plan are determined and solidified.

Events

1. MG recommends that the events team of the Fundraising Committee focus on maximizing the delivery of fundraising messages at Friday Forums and other ongoing Club events. Fundraising house parties, receptions and events should be incorporated into planning calendars for the new membership campaign and civic engagement marketing campaign.
2. The events team should collaborate with the Programming Committee to produce a new major annual speaker event and evening black-tie gala that would feature a high-profile national speaker. Major sponsors would fund the event and the evening would be used as the Club's premier cultivation event of the year.

Creating a Culture of Philanthropy

City Club's staff and members, along with all communications tools, must adopt messaging around fundraising. With consistent messaging related to philanthropy along with active personal participation as donors, City Club members and prospects will understand their role in supporting the Club's mission and special initiatives. It is critical that staff and Fundraising Committee members continually think about how to integrate fundraising into all program and communications activities and in all interactions with City Club stakeholders, prospects and donors.

FUNDRAISING TOOLS

Campaign case statement

A campaign case statement will be needed for major donor cultivations and to develop the language that will be needed for all campaign materials, grant proposals and sponsorship proposals. The campaign case statement will outline the need that the Club will fulfill, the vision and strategy of the Club, major components of the campaign, the financial goals and a call to invest. The background packet and side bars of the case statement should include a description of the Club's history, mission, key messages, testimonials and stories, a "shopping list" of items requiring funding, and a list of naming or recognition opportunities that donors will receive for gifts at different levels.

Prospect list

As discussed in the fundraising strategies, a prospect list should be developed to identify and track donor prospects, qualify their capacity to give and determine pathways for their cultivation.

Database

An effective donor and prospect database will be one of City Club's most important fundraising tools and is the key to ongoing fundraising success and stewardship. This is the tool that creates the institutional memory that will extend beyond the time frame of the current staff and membership. It also is the tool that helps assure that details about a prospect, once discovered, are remembered and acted upon. The database must efficiently track all background information on a prospect along with giving history and a history of donor contact.

MG strongly recommends purchasing a highly flexible and powerful software system that integrates fundraising fields and modules with City Club's other database needs for member services, renewals and event registration. Blackbaud's Raiser's Edge delivers the industry standard for fundraising software with over 13,000 nonprofit users, and has packages that integrate other membership and event registrations needs. (C) Systems' iMIS (www.csystemsllc.net) is another powerful system that MG has found to work successfully for member-based nonprofits. Start-up costs for systems of this caliber start in the \$15,000 to \$20,000 range and include excellent support and training.

Wealth screening

One of the ways to gather information on a donor for inclusion in the database is through electronic wealth screening of public domain information. The City Club should consider running its current and lapsed member list through wealth screening to identify additional major donor prospects and to better target the Annual Fund appeal levels.

For targeted prospects, more customized research is advisable. Metropolitan Group (or another full-service fundraiser) can provide wealth-screening services to City Club to search for business affiliations, stock transactions, pension holdings, household profiles, past giving histories and private foundation information for major individual gift prospects. This process would be an effective donor screening method for City Club while the total number of major gift prospects to be researched is small (less than 100 prospects per year). If the prospect list becomes larger, it would be advisable for City Club to contract with a dedicated prospect research service provider.

To keep the donor database up-to-date for prospects who are not current City Club members, the Club should run a National Correction of Address (NCOA) on this file at least once a year.

RECOGNITION STRATEGIES

It is critical for City Club to create a stewardship culture and to have the tools and processes that enable donors to be recognized for their significant contributions to the organization. MG recommends annual giving levels to cultivate, solicit and recognize donors that support the Club. Examples follow, although MG recommends that the Club to develop names for levels based on historic Club Members and events.

Annual Fund and major gift levels (Names can be adapted or changed)

Level	Gift Amount
Citizen's Circle	Annual donors of \$25,000 plus
Agora Society	Annual donors of \$15,000-\$24,999
Collonade Club	Annual donors of \$10,000-\$14,999
President's Club	Annual donors of \$5,000-\$9,999
Advocates	Annual donors of \$1,000-\$4,999
Friends	Annual donors of \$500-999
Supporters	Annual donors of \$499 and under

All donors should be listed alphabetically by the level of gift on City Club's website, in the City Club *Bulletin* and in the Club's annual report. In addition, the following recognitions will be given:

The following "thank you" protocols should be used:

- All donors should receive a thank you letter signed by the executive director.
- All donors should be recognized in the annual report, in the *Bulletin*, and on the website by giving level, in alphabetical order.
- Donors of \$500 or more should receive a personal thank you card from the executive director.

- Donors of \$1,000 or more should receive a personal thank you note from the executive director and a personal note from the City Club president.
- Donors of \$10,000 or more should receive a call from the executive director and the City Club president and a personal thank you note from the executive director and a personal note from the City Club president.
- Donors of \$20,000 or more should receive a personal visit/briefing from the City Club president and the executive director and a personal thank you note from the executive director and a personal note from the City Club president.

PLAN BUDGET AND TIMELINE

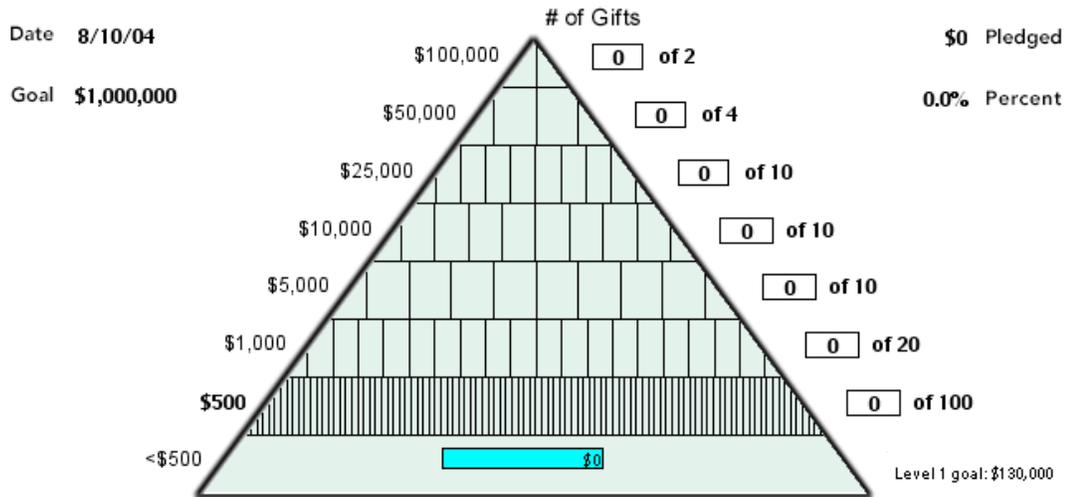
The proposed budget reflects the approximate level of resources that City Club will need to commit to implement this plan and meet its membership, marketing and fundraising goals over the next three years. Real potential costs are reflected, some of which will be actual cash and some that may be garnered as in-kind donations.

The proposed timeline reflects an estimated process for rolling out various campaign strategies proposed in this plan over the next three years.

Both the budget and timeline are located in the appendices.

APPENDIX A

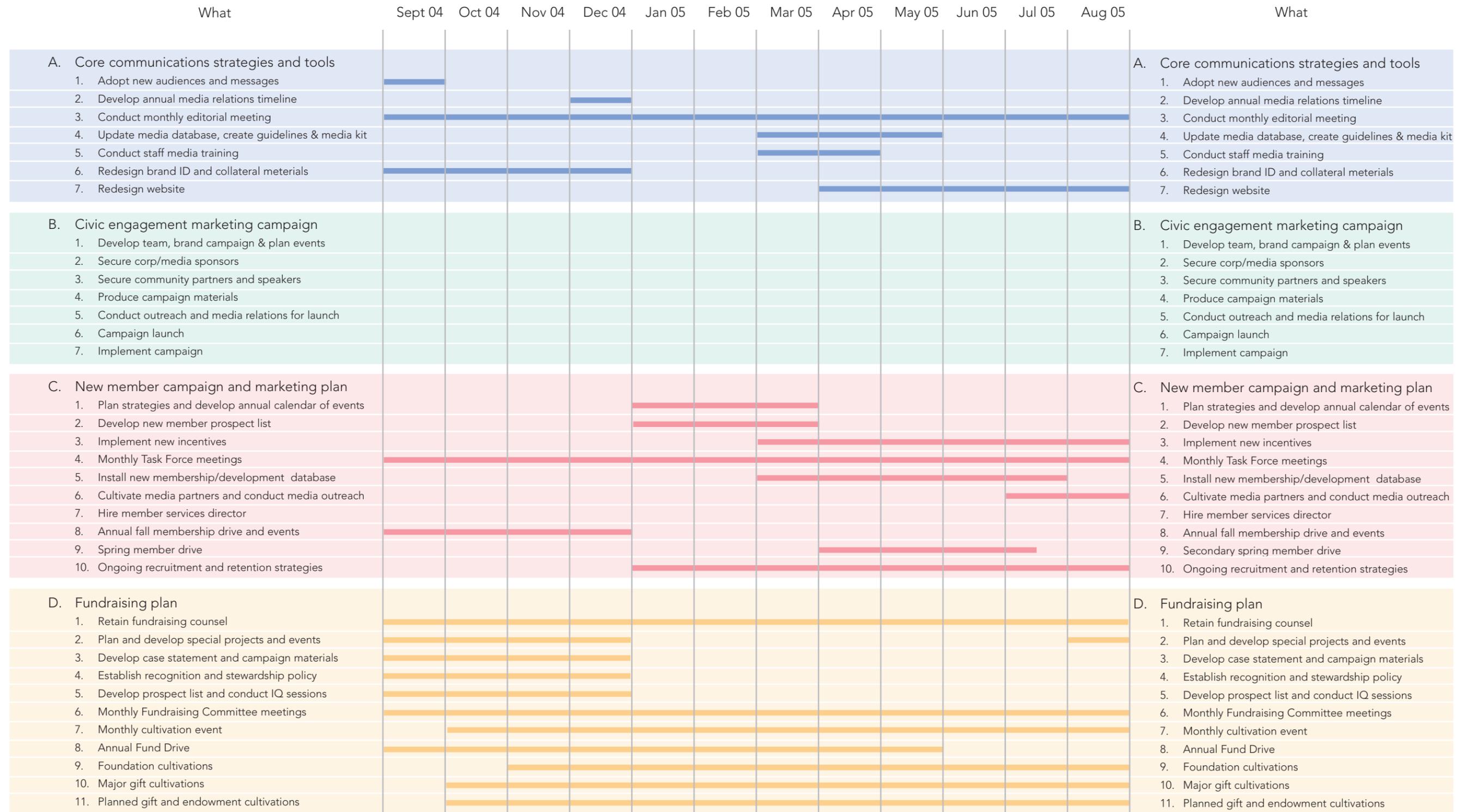
MODEL CAMPAIGN PYRAMID



APPENDIX B

THREE-YEAR TIMELINE (OVERLEAF)

City Club of Portland Membership, Marketing and Fundraising Plan – Three Year Implementation Timeline



City Club of Portland Membership, Marketing and Fundraising Plan – Three Year Implementation Timeline



City Club of Portland Membership, Marketing and Fundraising Plan – Three Year Implementation Timeline



APPENDIX C

FOCUS GROUP AND SURVEY RESULTS

MG identified three audiences to participate in the 90-minute focus groups and online surveys. Total audiences tested included 48 current City Club members, seven former members and seven nonmembers. The pool of members and former members was selected randomly and from a targeted group of community and business leaders. Nonmembers were selected from a mix of central city business leaders and mid-career managers from a diverse range of companies and organizations. Two focus groups were conducted; one with seven City Club members and another with eight nonmembers. A third pool of former members was scheduled, but no one showed at the appointed time. To compensate for the lack of former member participation in the focus groups, MG sent an online survey to a new pool of 100 former members and an additional pool of 200 current members. The online survey generated 41 responses from members and seven responses from former members. The following questions were asked of the participants:

- Describe the City Club and what it does. What is your perception of the Club's role in the community?
- Review this set of 10 messages about the Club and rank each message's effectiveness at resonating with your values and interests.
- Review this list of City Club programs, activities and recently studied issues and rank how they resonate with your values and interests. Which programs and services do you value most and why? What programs or services are not present that you would like to have?
- City Club is considering the option of moving its offices and public meeting spaces to a central downtown storefront location. Does this idea appeal to you? What would you like to have in a space like this? What would you not like to have?
- For members and former members, Why did you join City Club?
- For members, What do you think about Club materials? What would be the best way to keep you informed of Club activities?
- For members, Would you consider supporting the Club's new initiatives with a contribution? If so, what would you be interested in supporting (programming, technology, new space, etc.)?
- For former members, Why did you not renew your membership? What would you want or need from the Club to join again?

Results

Following is a representative selection of the ideas and opinions offered by focus group and survey participants.

When asked to describe the City Club and what it does, key responses included:

Members

“I define the City Club as two things: an excellent educational opportunity; and a wonderful networking opportunity.”

“Just about every topic has been discussed in one form or another over the time I have been a member. Things that I wouldn’t have paid attention to otherwise, I have learned a little bit about because of City Club functions.”

“I say it’s the conscience of the city, [when telling people about it]. It is something you can be involved in a whole spectrum of ways: at the very least you get the bulletin and can see what’s going on; or the Friday lunches which are generally interesting and fun; research studies are fun and interesting; there is just a whole myriad of ways to be involved...”

“A forum for public engagement.”

“Research. Meet.”

“If you live in Portland, you should join City Club to be informed.”

“[City Club is] A group of civic-minded citizens who meet to discuss issues of relevance to the city and the metropolitan area.”

Former members

“The City Club provides a venue for sharing information, for networking, and for the discussion and study of important issues that impact Portland, the region, the state, and, sometimes, even the nation and the world. I would describe it as a group of interested and connected men and women in the community who care about larger issues and want to have some influence on them.”

“[City Club] provides a forum for speakers and discussion of issues affecting the business environment and community of Portland.”

Nonmembers

“I have heard the broadcast on the radio...I feel that current events and news go through too many filters before getting the information in the paper and to the public.”

“The City Club gives an impartial or both-sides view.”

“I think of it as prestigious...I feel like I would be out of place in the City Club, but membership is reasonably cheap.”

“Feels like City Club is entrenched in the channels of power in Portland as an establishment.”

“They are tied to local planners and builders...lean towards the Katz administration, city planners and developers.”

“I wish I knew.”

When asked to describe the City Club's role in the community, responses included:

Members

“[City Club's] role is to stand up and make information available in an interactive community. Duty is to put action components into that.”

“It's the only organization that at least attempts to present information debate in a relatively neutral environment.”

“It [City Club] brings people together...reminded me of a small town meeting...social cohesion is dwindling.”

“Proactive and innovative leadership. Many members strike me as leaders, intellectuals and innovators in their own fields, and that they come together to analyze what's going on in our community, to solve problems but also to create a vision for our community's future health. In that sense I also view the role as progressive.”

“The primary purpose of the City Club is to provide a means for people to act together to enhance and improve the nature and functions of the city.”

“To connect the people who are interested in Portland and Oregon government and issues with each other.”

“It ought to be a thought-leadership group that helps the civil society understand and embrace needed change. But I don't think it does that currently.”

Former members

“Fosters greater understanding of civic and political issues affecting Portland's business environment and community.”

“The group is a respected organization that furnishes the community with information on a variety of topics, also some guidance and recommendations regarding actions needed.”

Nonmembers

“It would be more attractive for me (as an African-American male) to see a more inclusive perspective. My boss spoke at a City Club meeting and I attended and I was looking for a broad discussion. It ended up being focused on the majority populations ideas and perspective.”

“They don’t seem to be out in community, who are they?”

When asked about what services and programs were the most valuable, responses included:

Members

“Issue and ballot initiatives studies are important. Not always hitting the target but gets a broad base of people to look at an issue.”

“Is the Friday Forum necessary every week? It might be better two or three times a month.”

“...I am worried about the City Club being an advocate for issues.”

Former members

“I applaud your move away from the MAC for Friday Forums. It gave an inappropriate, elitist image. Other issues that are troublesome are the high cost of membership and the lack of younger members.”

Nonmembers

“A lot of the speakers are running for office. Bring in people that have more extreme views on the topics. I want to hear the radical ideas.”

“Invite people who are directly affected by the issues to the meetings and forums.”

“I like the [research] reports.”

“Citizen’s Salon is one of the better ideas I have heard...Clever but really expensive.”

“I like it that the new leaders events are in bars and restaurants around the city, plus it is good for business.”

“If the City Club really wanted to attract a broad-based representation they would have meetings in communities all over the city to get people involved.”

When asked to comment on the proposed storefront space and amenities, responses included:

Members

“It depends on how much it costs.” (several nods in the room)

“A central location would be nice.”

“I really admire thinking outside the box. Something new, the receptions are always in the grim meeting rooms, but I would hate to see the Club go into financial peril.”

“Great idea. It would allow us to collaborate with others on community projects.”

“Anyone who uses the space would be involved in the space, it’s wonderful for the City Club to overlay with the community.”

“Having an uplifting space might make people more willing to give money.”

“Sometimes I feel like the City Club is in danger of being pigeonholed...the space and partners shouldn’t alienate the club in any way.”

“I’m concerned about what the space looks like...City Club is trying to be more diverse. No swanky space.”

“I don't think the space should become a place where people are recruited to contribute time and money to various good causes, political or social. I think it might undermine the sense of openness and tolerance we want to promote.”

“I don’t want it to be a flophouse for every homeless person in the area, or a hangout for people who aren’t contributing or who would make me feel unwelcome in my own club. I don’t want the character of the organization to change.”

“The coffee shop idea is awful and promotes the idea that the club is about socializing rather than doing civic work. That is the wrong message for the Club to be sending to the public or its members.”

Former members

“I’m not sure I think this is the best use of Club resources. Would it be large enough to host the Friday Forums? How would the library differ from what the Central Library now offers? I know there is a great yearning for more community space and involvement...and maybe this idea has arisen from polling members and others in the community, but at this point I wonder if it’s duplicative.”

“Coffee shops and a more accessible feel would be great. Coffee shops, in general, have long been places for having good discussions.”

Nonmembers

“Sounds good but expensive.”

“Who is the City Club trying to attract? Sounds great, but a downtown location doesn’t represent the overall community of Portland. Are they trying to reach out to the same population they always have but younger?”

When members were asked why they joined City Club, responses included:

“I joined to make business contacts but have enjoyed maintaining my involvement as a way to make friends and learn more about the issues of our day.”

“I was invited, and I wanted to make a difference.”

“I come from a small New England town where participation in public life through town meetings and active political participation was, at least up through my parents’ generation, a way of life. The City Club looks like it might provide a way to continue that kind of participation in the modern, urban city.”

“I was invited to join by a past president of the League of Women Voters of Portland. I believed then, as I still do, that it was a good way to meet the ‘movers and shakers’ in this city.”

“To volunteer, to be involved in more community service. To network, to lead and learn...in particular in New Leaders Council, where there are people my age (30s) who have similar desires to be active and serve their community. In my other volunteer activities, I tend to be the younger of the volunteers around me, so it gives me an opportunity to be around peers interested in shaping the community around them (i.e. instead of sitting on their asses at home and complaining about it).”

When members were asked about what program and service enhancements they would consider supporting with a contribution, responses included:

“Media presence. I always thought the text from the speeches of the City Club should be published in *The Oregonian* or on the City Club website.”

“I would be inspired to give money to upgrade the technical abilities of the Club.”

“I would help the City Club reach out to traditional media, raise awareness and get new members.”

Members who took the online survey were also asked to select from a list of program and service enhancements that they would consider supporting with a gift. Of 27 respondents

to this question, 58 percent indicated that they would help to fund stronger advocacy of City Club research and a stronger presence for the Club in the media. 39 percent indicated that they would help fund new technology enhancements for the Club.

When members were asked about what they would like to see added or changed in City Club programs and services, responses included:

“I would like to see outreach really targeted. What communities to reach out to?”

“...advocacy is so subjective... if the City Club intends to be biased or partial it will scare people away.”

“Someone will always be disappointed with advocacy, I’d rather see City Club in a brand new space or launch a campaign to the Hispanic community.”

“More social activities that members can get involved in to meet other members. The new member reception is a perfect example of what the club should be doing more of.”

“A program that goes a step beyond the member issue committees, discussions and position-taking. For instance, once a position is set by the Club, we should take action beyond educating members and the public to the point of a planned activity where members can DO something... For me, it's not enough to learn about a position and then educate others. I also want to feel I can do something immediately tangible such as volunteering one of my Saturdays (or whatever) to do hands-on work that supports the position.”

“I think there should be a program which enables members of the community who cannot afford the general price of membership to attend the events and get involved. The members all appear to be from a wealthy socioeconomic background. Yet the community of Portland is far more diverse. I’d like to see City Club make an effort to diversify its membership both culturally and socio-economically.”

“The City Club risks losing sight of its unique position in the community if it tries to be all things to all people. Anything not tied to its basic research and forum responsibilities is diluting the resources of the Club.”

“We used to do half-day training sessions in shorter time frames to discuss issues... for example, leadership and diversity.”

“Some sort of formalized way to get broader representation of political philosophies, or a more open acceptance to hearing and trying to learn from differing and even critical voices.”

When nonmembers were asked if they would consider joining the Club, responses included:

“Time is an issue, but I would consider it.”

“Probably not yet. I want to find out what it is about.”

“What is the advantage of membership? I don’t like the exclusiveness about it. Time is too important to utilize it a la carte.”

“I want more information and then I’ll decide.”

When former members were asked why they did not renew their membership, responses included:

“I no longer work downtown and don’t want to break my home-based work day by getting dressed up to attend Friday Forums.”

“A number of years ago, my work in Multnomah County involved a standing Friday committee meeting that I had to attend. At that point I couldn’t get to the Friday lunches, so I let it drop. I guess I then got out of the habit... However, this survey is causing me to think about that.”

“I did not find the Club to be a very friendly or open organization. I went to many lunches and other get-togethers and never connected with other members. Most of those there seemed to talk with those they already knew, not newcomers like myself.”

“I liked the City Club very much and enjoyed the Friday luncheons and speakers. My employer paid my membership. When I left my job, however, I was no longer in a position to keep up the dues by myself. It’s that simple.”

“City Club probably works well for new members who arrive with a high profile in the community. It would need to be far more welcoming to ‘regular’ folks for me to consider rejoining.”

Following are results of scored surveys. Rankings are scored based on the percentage of people that marked their preference on a scale of one to five (with one being least preferred and five being most preferred) for each item surveyed (programs and messages of the Club). Percentages of preferences are measured per question. The percentages presented do not compare preferences of one surveyed item to another. Complete survey reports and comments are also included in this appendix.

- 86 percent of members surveyed ranked research as the most valuable program element that City Club offers.
- 56 percent of members ranked forums and events as the most valuable program element that City Club offers.
- 54 percent of members ranked advocacy as very valuable to the Club.

- 32 percent of members ranked issue committees as somewhat valuable, 26 percent ranked them as very valuable and 24 percent ranked them as most valuable.
- 67 percent of former members ranked research as the most valuable program element and 67 percent ranked forums and events as most valuable.
- 57 percent of nonmembers ranked research as the most valuable program element and 43 percent ranked forums and events as the most valuable.
- 43 percent of nonmembers ranked advocacy as least valuable to them.

MG tested key messages about the Club to determine what resonated personally with the individuals surveyed. Results included the following:

“City Club informs its members and the community in public matters and arouses in them a realization of the obligations of citizenship.” (City Club mission)

- 83 percent of members ranked this message somewhat resonant to most resonant.
- 100 percent of former members ranked this message somewhat resonant to most resonant.
- 85 percent of nonmembers ranked this message as least resonant to somewhat resonant.

“City Club is recognized nationally as a model for citizen-based independent research of public policy issues and respected statewide for fair and impartial political debate and discussion.”

- 69 percent of members ranked this message as somewhat resonant to most resonant.
- 67 percent of former members ranked this message as somewhat resonant.
- 83 percent of nonmembers ranked this message as somewhat resonant.

“City Club of Portland brings engaging speakers and timely topics to the community.”

- 72 percent of members ranked this message as somewhat resonant to most resonant.
- 67 percent of former members ranked this message as somewhat resonant.
- Nonmembers responded evenly across the board to this message.

“City Club gives members contact with policymakers and opinion leaders, helps citizens influence public policy and increases civic debate.”

- 67 percent of the members surveyed felt this to be somewhat to most resonant.

- 50 percent of former members felt this to be somewhat resonant.
- 71 non-members felt this one to be somewhat resonant.

“City Club is nonpartisan and open to everyone.”

- 70 percent of members ranked this message as very resonant.
- 50 percent of former members ranked this message as somewhat resonant.
- Nonmembers responded evenly across the board to this message, although one person expressed in the discussion that he distrusts organizations that forcefully make this claim.

“City Club research reports and ballot measure studies are unbiased and timely.”

- 76 percent of members ranked this message as somewhat to most resonant.
- 83 percent of former members ranked this message as somewhat resonant.
- 71 percent of nonmembers ranked this message as somewhat resonant.

“City Club offers a lot more than just Friday Forums.”

- 35 percent of members ranked this message as somewhat resonant and 35 percent ranked it as most resonant.
- 50 percent of former members ranked this message as somewhat resonant.
- 71 percent of nonmembers ranked this message as least resonant.

“City Club increases your understanding of the issues affecting our city, region and state.”

- 53 percent of members ranked this message as most resonant.
- 100 percent of former members ranked this message as somewhat resonant to most resonant.
- 57 percent of nonmembers ranked this message as somewhat resonant.

“City Club is a way of lifelong learning.”

- 38 percent of members ranked this message as most resonant.
- 67 percent of former members ranked this message as somewhat resonant to most resonant.

“City Club’s members, reports and programs are focused on understanding how the city works in the present, learning lessons from the past and realizing possibilities for the future.”

- 64 percent of members ranked this message as somewhat resonant to most resonant.
- 83 percent of former members ranked this message as somewhat resonant to most resonant.
- 85 percent of nonmembers ranked this message as somewhat resonant.

APPENDIX D

IMPLEMENTATION BUDGET

To be completed in greater detail after strategies and tools are refined with City Club.