



保羅·哈理斯協會 行銷計劃

THE PAUL HARRIS SOCIETY MARKETING PLAN

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第一階段

首先我草擬了一份第一階段之行銷計劃，於 1999 年初將我的想法與計劃提供給我們地區之領導人，他們即刻照單全收。

1999 年六月：將 5340 地區的保羅·哈理斯協會之概念在年度基金顧問訓練會中介紹給我們的 12 位基金會之顧問、助理總監以及地區之領導人。並且要求這些基金顧問們在 8 月及 9 月基金說明會中倡導這些新的表彰層級。同時也要求助理總監於其社務行政會中做同樣的宣導。而在聞名全球之 La Jolla 地方之沙克學院所舉行的 9 月年度基金講習會中，這些顧問與助理總監再度宣導該計劃。

1999 年九月：在基金講習會中，5340 地區保羅·哈理斯協會正式介紹給與會的 300 位出席者，當他們離開時，也分發給參加半日講習會之學員 3x5" 小卡片，上面展現出激勵人心，我們地區所從事不同的基金計劃。

1999 年 10 月：我們地區總監發出宣導信函給地區之每位扶輪社社長、扶輪社基金主委及地區之領導人來說明這個對扶輪基金會捐贈的新層級。

各別寫信：是用我們地區總監公式信函並由總監簽名之信件郵寄每位創會會員感謝他們之慷慨解囊並親自邀請他們參加一個扶輪基金慶祝晚宴前之特別貴賓接待會並且安排與國際扶輪前社長 Cliff Dochtermann 及其夫人 Mary Elena 握手的機會。

Phase I

First, I developed a Phase I Marketing Plan and presented the idea and the Plan to our District Leadership in early 1999. The Leadership readily bought into this whole program, which went something like this:

June 1999: Introduce The Paul Harris Society of 5340 to our twelve Foundation Mentors, assistant governors, and District Leadership at our annual Foundation Mentor Training. The Mentors were asked to promote this new level of recognition during their Foundation presentations in August and September. The assistant governors were asked to do the same during their Club Assemblies. The Mentors and assistant governors also promoted our September annual Foundation Seminar at the world-famous Salk Institute in La Jolla.

September 1999: Foundation Seminar The Paul Harris Society of 5340 was formally introduced to nearly 300 attendees and the 3 x 5 cards were distributed as attendees exited this half-day seminar which is designed to inspirationally present our District's involvement in the various Foundation Programs.

October 1999: promotional letter from our DG was sent to each Club President, Club Foundation Chair, and District Leadership to explain this new level of giving to The Rotary Foundation.

Personally addressed letter was prepared with our DG's letterhead and signature and mailed to each Charter Member thanking them for their generosity and personally inviting them to a special VIP pre-Foundation gala dinner reception in their honor... and an opportunity to shake hands with PRIP Cliff Dochtermann and his wife, Mary Elena.

1999年11月：在700位與會者之扶輪基金慶祝晚宴中介紹我們新的計劃並且將3x5"卡片放在每一個座位上。

地區通訊及網站：持續刊登這個表彰新的層級。

地區會議：在5340地區每年舉辦5~6次，通常在晚上舉行，主要是一種聯誼性質...用3x5"卡片繼續廣告。

2000年地區年會：展現創會會員與他們的領章並用更多的3x5"卡片作廣告。

2000年六月：在扶輪基金顧問訓練會；教育一群新的基金顧問與助理總監們一起從事1999年一樣行銷計劃。

2000年九月：扶輪基金講習會；有更多的5340地區的保羅·哈理斯協會的說明會及廣告。

2000年11月：基金晚宴，更多佩帶領章的創會會員讓我們的行銷計劃第一階段達到最高潮。

第二階段：

我們第二階段之行銷計劃是使我們這個行銷計劃之成效有活力並且使所有扶輪社員都能了解。我們並不期望將此計劃促銷給所有的人，但是我們要確使他們瞭解該計劃以使他們有意願加入。

秋季信函：由地區總監逐一發函給每一位5340地區保羅·哈理斯協會會員，並感謝他們成為會員或再續任會員，如果他們仍未更新其會員資格提醒他們趕快辦，同時也邀請他們參加在我們年度基金慶祝晚宴前之特別表揚歡迎會。該函強調我們需要增加基金會的年度捐獻以支持我們日漸增加參與各種不同的基金計劃。

春季信函：與以上信函一樣，唯一不同的是邀請每一位參加在地區年會中的特別表揚歡迎會。

我們發現許多捐獻人習慣捐美金1,000元或更多的錢給Alma Maters、他們喜歡的慈善機構等。然而現在他們慷慨捐贈則包括了扶輪基金會。

我們同時也發現我們的鉅額捐獻人名單業已實質增多了，因為這種每年較高層級的捐獻使他們要超越壹萬美金會更加容易。

扶輪義工：這項計劃需要一位熱心人士，最好是前總監去執行該計劃2~3年。經過幾年持續不停的行銷，該計劃將會持續存在並易於監管。

在我們的1999-2000第一個年度裡，我們表揚了45位5340地區新的保羅·哈理斯協會創會員。在2000-01年度，我們的會員成長到110位到目前為止仍然保有同樣的數目。

November 1999: Foundation Gala Dinner 700 attendees were introduced to our new program and a 3x5 card was placed at each place setting.

District Newsletters and Website: continual advertising of this new level of recognition.

District Councils: held in 5340 five or six times each year, in the evening, mainly a social function...and continued advertising with the 3x5 cards.

District Conference 2000: presented Charter Members with their lapel banners and more advertising via the 3x5 cards.

June 2000: Foundation Mentor Training; educated new crop of Foundation Mentors who did the same marketing as in 1999, along with the assistant governors.

September 2000: Foundation Seminar; more PHS of 5340 presentations and advertising.

November 2000: Foundation Dinner, culminated our Phase I Marketing Plan with more Charter Member presentations of the lapel banners.

Phase II

Our Phase II Marketing Plan consists of our keeping the marketing efforts alive and visible to all Rotarians. We don't push this program on anyone but we make sure they are aware of the program should they desire to step up.

The Fall Letter: A personalized letter from our DG to each member of the PHS of 5340 which thanks them for becoming a member or renewing their membership, asks them to renew their membership if they haven't already done so, and invites them to our Special Recognition Reception to precede our annual Foundation Gala Dinner. This letter emphasizes our need to increase Annual Giving in support of our increasing involvement in various Foundation Programs.

The Spring Letter: The same as above only each is invited to a Special Recognition Reception at the District Conference.

We've found many donors who historically gave \$1,000 or more to their Alma Maters, favorite charities, etc. now include The Rotary Foundation in their generous giving.

We've also found our lists of Major Donors has increased substantially as this higher level of annual giving enables them to surpass the \$10,000 level more quickly.

Volunteer: This program needs one dedicated Rotarian, preferable a PDG, to see the marketing plans get implemented over a two to three year period. After several years of sustained marketing, this program tends to take on a life of its own...and gets easier to oversee.

In our first year of 1999/2000, we recognized 45 members of the newly-created The Paul Harris Society of 5340. In 2000/01, our membership grew to 110...and has remained somewhat the same since.