



DISTRICT 5550
STRATEGIC PLAN
2015 - 2018

STRATEGIC PLAN 2015-2018



Vision



To be universally recognized for our commitment to Service Above Self and to advance world understanding, goodwill, and peace.

Key Result Areas That Are Pillars Supporting Our Vision

Development of an effective team of district and club leaders

- Goal #1:** Ensure each club has a champion to promote and increase the use of technology.
- Goal #2:** Continue to support and promote Rotary Leadership Institute throughout our district.
- Goal #3:** Provide top notch training to clubs with PETS and Assemblies annually.
- Goal #4:** District Training and Succession Planning Committee meets monthly.

Strategies to enhance Rotary Branding and Grow our Membership

- Goal #1:** Enhance public image & awareness of Rotary.
- Goal #2:** Promote new styles of membership.
- Goal #3:** Net 1 new member per club per year.
- Goal #4:** Enhance communications with Rotary Alumni.

Support the Rotary Foundation

- Goal #1:** Increase the level of giving by 10% per year for each of the next three years to the Annual Programs Fund and PolioPlus.
- Goal #2:** Encourage clubs to sponsor and carry out effective service projects both locally/internationally.
- Goal #3:** Increase number of Benefactors, Major Donors, Paul Harris Fellows, Paul Harris Society members and Bequest Society donors.

Youth & the Family of Rotary

- Goal #1:** Listen to our new members and meeting their needs.
- Goal #2:** Sponsor a minimum of 4 more Rotaract or Interact Clubs each Rotary year and increase support to existing clubs.
- Goal #3:** Increase number of Long Term Youth Exchange students to 30, outbound annually within 3 years & accordingly increase the number of clubs participating in the program.
- Goal #4:** Promote and sponsor all youth programs and increase Short Term Exchange numbers by 3 per year.

OUR CORE VALUES

Service, Fellowship, Diversity, Integrity, Leadership

MISSION

To provide service to others, promote high ethical standards, and advance world understanding, goodwill, and peace through its fellowship of business, professional, and community leaders.

STRATEGIC PLANNING & GOAL SETTING SUMMARY

Key Result Area # 1 Development of an Effective Team of District and Club Leaders

Goal # 1 Ensure each club has a champion to promote and increase the use of technology

Strategy: Each AG will work with their clubs to help select and guide club champions through the technology

- Action Plan:
(Specific action steps)
1. Advise all clubs regarding the need for a champion
 2. Provide training for AGs and champions where necessary
 3. Assist champions when they meet challenges
 4. Club champions will assist in the entry of club data on ClubRunner and Rotary Club Central

Outcomes / Results
Expected because of
your actions:

Club data will be updated in a timely manner on Club Runner and Rotary Club Central

Human Resources
Needed:

AGs, Trainers, club champions

Financial Resources
Needed:

None beyond PETS and District Training Assemblies

Person(s)
Responsible:

DG, AGs, District Trainer

Due Date: June / 30 / 2016 Significant Improvement at this time

Actual Completion
Date: / / (ongoing)

Key Success Factors: Improved reporting of club data

How results will be
measured?
(identify specific
measurement criteria)

Club data will be monitored on Rotary Club Central and Club Runner at least quarterly

STRATEGIC PLANNING & GOAL SETTING SUMMARY

Key Result Area # 1 Development of an Effective Team of District and Club Leaders

Goal # 2 Continue to support and promote Rotary Leadership Institute throughout our district.

Strategy: Ensure all club members are aware of the opportunities for RLI

- Action Plan:
(Specific action steps)
1. Promote RLI at PETS, District Training Assemblies & District Conference.
 2. Increase awareness of what RLI is through District website
 3. Send e-mail notices to membership regarding upcoming RLI events
 4. Have links to upcoming RLI sessions on District Web Page
 5. Finish establishing RLI Regional Committees & appointed District Reps to work with District Training Team.
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Outcomes / Results
Expected because of
your actions: Increased participation at RLI events, more members aware of leadership opportunities within Rotary

Human Resources
Needed: RLI facilitators, District Trainers, AGs, web master

Financial Resources
Needed: RLI should be self supporting annually
Budget annually for Facilitator Training
Encourage clubs to fund member participation for RLI

Person(s)
Responsible: District Trainers, District RLI Reps, AGs, Club Presidents

Due Date: June / 30 / 2016 (ongoing program)

Actual Completion
Date: _____ / _____ / _____ (ongoing)

Key Success Factors: Greater number taking RLI training, more members willing to take leadership positions

How results will be
measured?
(identify specific
measurement criteria)

Comparison of registration data for RLI year to year, District and club positions filled with strong leaders in a timely manner.

Number of graduates of total RLI program

STRATEGIC PLANNING & GOAL SETTING SUMMARY

Key Result Area # 1 Development of an Effective Team of District and Club Leaders

Goal # 3 Provide top notch training to clubs with PETS and District Training Assemblies annually.

Strategy: Hold PETS and District Training Assemblies in a timely manner in suitable locations

Action Plan: 1. Hold Pre-PETS and PETS no later than eight weeks following the International Assembly.

(Specific action steps) 2. Hold PETS at a location readily accessible to all incoming club presidents

3. Encourage vice presidents to attend PETS with their president elect

4. Improve attendance at District Training Assemblies through publicity

5. Develop club secretary training webinar

Outcomes / Results
Expected because of
your actions:

Better trained club presidents and officers will result in more vibrant clubs with viable strategic plans.

Human Resources
Needed:

Training Team, Zone Reps, District Chairs

Financial Resources
Needed:

PETS and assemblies should be self sustaining

Person(s)
Responsible:

DGE, District Training Team

Due Date: _____ / _____ / _____ (ongoing)

Actual Completion
Date: _____ / _____ / _____ (ongoing)

Key Success Factors: Club growth in numbers, member retention and successful club projects

How results will be
measured?

(identify specific
measurement criteria)

Observation of membership numbers on RCC and ClubRunner

STRATEGIC PLANNING & GOAL SETTING SUMMARY

Key Result Area # 1 Development of an Effective Team of District and Club Leaders

Goal # 4 District Training and Succession Planning Committee meets monthly,

Strategy: Immediate PDG will call and chair meetings of the committee

- Action Plan:
(Specific action steps)
1. Establish the committee – minutes March 9/15 board meeting
 2. Set the parameters of the committee – minutes March 9/15 board meeting
 3. Set schedule of monthly meetings
 - 4.

Outcomes / Results
Expected because of
your actions:

Proactive recruitment of new and replacement district leaders on continuing basis.

Human Resources
Needed:

IPDG, second immediate PDG, DG, DGE, DGN, a District Trainer and 2 board members at large

Financial Resources
Needed:

Access to GoToMeeting

Person(s)
Responsible:

Immediate Past District Governor

Due Date: 1st meeting by July 31, 2015 (ongoing monthly)

Actual Completion
Date: _____ / _____ / _____ (ongoing monthly)

Key Success Factors: All district positions filled in a timely manner with prospects of vice chairs.

How results will be
measured?
(identify specific
measurement criteria)

Meeting minutes reported to the district executive and board with positions filled as needed.

STRATEGIC PLANNING & GOAL SETTING SUMMARY

Key Result Area # 2 Strategies to Grow Membership

Goal # 1

Enhance public image & awareness of Rotary.

Strategy:

Using media and web resources to publicise Rotary events and status

Action Plan:

(Specific action steps)

1. Provide clubs with the latest information from Rotary Brand Central
2. Encourage clubs to publicise their events on district and club web sites
3. Encourage the use of local media to publicise Rotary projects and events
4. District will maintain presence on social media and conventional media

Outcomes / Results
Expected because of
your actions:

Greater awareness will result in more members and friends of Rotary

Human Resources
Needed:

Web master, District Public Relations Chair, Club Public Relations Chairs, AGs

Financial Resources
Needed:

To be determined annually in District Budget

Person(s)
Responsible:

District Public Relations Chair

Due Date:

_____ / _____ / _____ (ongoing)

Actual Completion
Date:

_____ / _____ / _____ (ongoing)

Key Success Factors:

Increased interest in Rotary and increased membership

How results will be
measured?

(identify specific
measurement criteria)

Clubs report number of media spots attained and membership numbers in Rotary Club Central.

STRATEGIC PLANNING & GOAL SETTING SUMMARY

Key Result Area # 2 Strategies to Grow Membership

Goal # 2

Promote new styles of membership.

Example: corporate/satellite & being a flexible club

Strategy:

Encourage clubs to try new categories of membership and club meeting formats

Action Plan:

(Specific action steps)

1. Communicate to clubs the new options available for membership and meetings

2.

3.

4.

Outcomes / Results
Expected because of
your actions:

More clubs with more members

Human Resources
Needed:

AGs, District Membership Committee, District Alumni Chair, Club Membership and Alumni Chairs,

Financial Resources
Needed:

Person(s)
Responsible:

District Membership Chair

Due Date:

June / 30 / 2016

Actual Completion
Date:

_____ / _____ / _____ (ongoing)

Key Success Factors:

Increase in overall membership

How results will be
measured?

(identify specific
measurement criteria)

Comparison of membership numbers using Rotary Club Central and reports from AGs on clubs that have introduced new membership styles.

STRATEGIC PLANNING & GOAL SETTING SUMMARY

Key Result Area # 2 Strategies to Grow Membership

Goal # 3

Net 1 new member per club per year.

Strategy:

Assist clubs in areas of recruitment and retention to increase total membership

Action Plan:

(Specific action steps)

1. Provide training on recruitment and retention at PETS
2. Provide training on recruitment and retention at District Training Assemblies.
3. Provide best practices and share ideas on ClubRunner and Rotary Club Central
4. Encourage flexibility of membership and meeting styles.

Outcomes / Results
Expected because of
your actions:

Increased membership, reversing the downward trend in membership

Human Resources
Needed:

Training Team, AGs, District and Club Membership committees, District and Club Alumni Chairs, Zone resources

Financial Resources
Needed:

Person(s)
Responsible:

District Membership Committee

Due Date:

June / 30 / 2016 (ongoing)

Actual Completion
Date:

_____ / _____ / _____ (ongoing)

Key Success Factors:

Improved attraction and retention of members

How results will be
measured?

(identify specific
measurement criteria)

Results will be recorded on Rotary Club Central and ClubRunner

STRATEGIC PLANNING & GOAL SETTING SUMMARY

Key Result Area # 2 Strategies to Grow Membership

Goal # 4

Enhance communications with Rotary Alumni

Strategy:

Establish District Alumni Chair to work with club alumni chairs to re-establish communications with alumni

Action Plan:

(Specific action steps)

1. Appoint District Alumni Chair
2. Establish scope of alumni chair responsibilities (John Hewko letter)
3. Use RCC to generate list of alumni
4. Share how to access available data on RI alumni list with clubs

Outcomes / Results
Expected because of
your actions:

Greater participation in Rotary events by alumni and increase in membership

Human Resources
Needed:

District Training & Succession Planning Committee members, Alumni Chair

Financial Resources
Needed:

none

Person(s)
Responsible:

District and Club Alumni Chairs, District Training & Succession Planning Committee

Due Date:

December / 31 / 2015 (ongoing)

Actual Completion
Date:

_____ / _____ / _____ (ongoing)

Key Success Factors:

Establishment of district alumni function as a club resource

How results will be
measured?

(identify specific
measurement criteria)

Number of meetings of Alumni chairs and District Alumni Committee, Increase in
Alumni events, Number of new members who are alumni

STRATEGIC PLANNING & GOAL SETTING SUMMARY

Key Result Area #3 Support the Rotary Foundation

Goal # _1_ Increase the level of giving by 10% per year for each of the next three years to the Annual Programs Fund and to Polio Plus

Strategy: Keep the presence there all through the year

Action Plan:
(Specific action steps) 1. Educate, -share the stories of the work of the Foundation
2. Participate, -begin with giving a small amount that each person can do
3. Expand, -grow your giving
4. Promote the Rotary Foundation on a monthly basis

Outcomes / Results Expected because of your actions: 10% growth each year

Human Resources Needed: District and Club Foundation Chairs, Foundation “Ambassadors”, AGs, Club Presidents

Financial Resources Needed:

Person(s) Responsible: District Foundation Chair

Due Date: Annual Review of the Progress to Goal Achievement

Actual Completion Date: _____ / _____ / _____ (ongoing)

Key Success Factors: Results will be measured by the actual growth in giving

How results will be measured?

(identify specific measurement criteria)

STRATEGIC PLANNING & GOAL SETTING SUMMARY

Key Result Area #3 Support the Rotary Foundation

Goal # 3 Increase the number of Benefactors, Major Donors, Paul Harris Fellows, Paul Harris Society members and Bequest Society donors

Strategy: Educate to donate

Action Plan: 1. The District Foundation Chair / Committee works quarterly with Club Presidents providing targeted education material to help clubs understand the benefits of TRF.

(Specific action steps)

Outcomes / Results Expected because of your actions: Increased giving/participation

Human Resources Needed: District and Club Foundation Chairs, AGs and Club Presidents

Financial Resources Needed:

Person(s) Responsible: District Foundation Chair

Due Date: Annual Review

Actual Completion Date: ____ / ____ / ____

Key Success Factors: By the increased # of donors and the size of their donations

How results will be measured?
(identify specific measurement criteria)

STRATEGIC PLANNING & GOAL SETTING SUMMARY

Key Result Area #4 Youth & The Family of Rotary

Goal # 1 Listening to our new members and meeting their needs

Strategy: Give new members opportunities to voice their opinions and feelings about Rotary

Action Plan:
(Specific action steps) 1. Build rapport so they are comfortable to speak and share
2. Ensure that new members are actively engaged in a committee
3. Provide opportunities for active interaction by new members
4.

Outcomes / Results
Expected because of your actions: 1. Higher retention of new members
2. New members take on leadership roles

Human Resources
Needed: Presidents and everyone in each club

Financial Resources
Needed:

Person(s)
Responsible: District and Club Youth Chairs, Club Membership Chairs and Club Presidents

Due Date: Annual Review

Actual Completion Date: _____ / _____ / _____ (ongoing)

Key Success Factors: Higher rates of retention
How results will be measured?
(identify specific measurement criteria)

STRATEGIC PLANNING & GOAL SETTING SUMMARY

Key Result Area #4 Youth & The Family of Rotary

Goal # 2 Sponsor a minimum of 4 more Rotaract or Interact Clubs each year and increase support to existing clubs

Strategy: Educate Clubs on the benefits of sponsoring Rotaract and Interact Clubs, and how to do it.

Action Plan: 1. The District Youth Chair develops an information package that can be shared with each club, to give them an understanding of the program and how to implement it

(Specific action steps) 2. Develop an effective way of sharing the material with Club Presidents to get their clubs enthused

Outcomes / Results Expected because of your actions: Achievement of the goal

Human Resources Needed: The District Youth Chair and a support team

Financial Resources Needed:

Person(s) Responsible: The District Rotaract/Interact Chair

Due Date: Annual Review

Actual Completion Date: _____ / _____ / _____ (ongoing)

Key Success Factors: By the growth in the numbers of Rotaract and Interact Clubs

How results will be measured?

(identify specific measurement criteria)

STRATEGIC PLANNING & GOAL SETTING SUMMARY

Key Result Area #4 Youth and the Family of Rotary

Goal # 3 Increase the number of Long Term Youth Exchange Students to 30 outbound annually within 3 years and accordingly increase the number of clubs participating in the program

Strategy: Educate, ask questions, listen to the feedback, and take action to adopt new processes and procedures that work to grow the Youth Exchange programs.

Action Plan: (Specific action steps)
 1. Survey clubs on their needs and thoughts on exchange program options
 2. Educate and Implement more flexible home hosting options
 3. Encourage clubs to re-engage in Youth Exchange programs

Outcomes / Results Expected because of your actions: A more active Youth Exchange program with at least 5-6 more exchange students each year for the next 3 years

Human Resources Needed: District Youth Chair, a local Youth Chair in each Club, Club Presidents

Financial Resources Needed: District and Club to consider promotional material costs in annual budgets

Person(s) Responsible: District and Club Youth Chairs, Club Presidents

Due Date: Annual Review

Actual Completion Date: _____ / _____ / _____ (ongoing)

Key Success Factors: Goals achieved

How results will be measured?
 (identify specific measurement criteria)

STRATEGIC PLANNING & GOAL SETTING SUMMARY

Key Result Area #4 Youth & The Family Of Rotary

Goal # 4 Promote and sponsor all youth programs and increase Short Term Youth Exchange numbers by 3 per year

Strategy: Educate clubs regarding the youth program options that are available to them

Action Plan: 1. Create excitement about youth programs in all clubs in the District
 (Specific action steps) 2. Identify a youth champion in each club
 3. Youth chair and a strong supporting committee communicates effectively and regularly with the champion in each club

Outcomes / Results Expected because of your actions: Experience a measureable increase in Youth Program participation and achievement of 3 more Short Term Youth Exchange students per year for the next 3 years

Human Resources Needed: Strong District and Club Youth Services Committees

Financial Resources Needed:

Person(s) Responsible: The District Youth Chair, Club Presidents, Club Youth Chairs

Due Date: Annual Review

Actual Completion Date: _____ / _____ / _____ (ongoing)

Key Success Factors: By the increase in participation in the Youth Programs and annual number of members participating in Short Term Youth Exchange

How results will be measured?

(identify specific measurement criteria)