

ROTARY INTERNATIONAL DISTRICT 5300

**STRATEGIC PLAN**

ROTARY YEAR 2008-09

***Goals for the Development of the Strategic Plan***

- Include input from district leaders and presidents
- Build on strengths; improve upon weaknesses
- Establish and communicate goals
- Develop workable strategies
- Reflect the District's mission statement

***District Strengths identified in January 08*** (general categories)

Foundation giving

Youth programs

Leadership

- \*Involvement of Past District Governor's (PDG's)
- \*continuity/constancy of purpose
- \*experienced Rotarians in leadership positions
- \*visibility of leaders
- \*District Leadership Plan in place
- \*Strategic Planning Committee
- \*Vision Facilitation Team

Communication: Website and Newsletter

***District Weaknesses identified in January 08*** (general categories)

Membership Decline

Poor marketing of training programs

Lack of Communication

Under-utilization of the website by clubs

Too much reliance on email

Presidents failing to delegate/share information

Over-extended Rotarians/Weak Committees

Lack of new Rotarians serving at the District level

District registration process

**DISTRICT 5300 MISSION STATEMENT**

District 5300 exists to support its Rotary Clubs with activities that help them become effective: growing and retaining members, carrying out public relations programs, conducting relevant community and international service projects, developing leaders, and supporting The Rotary Foundation.

## STRATEGIC PLAN GOALS AND STRATEGIES

### 1. **INCREASE MEMBERSHIP**

- Strategy: Conduct two Membership Development training seminars, one in California and one in Nevada;
- Strategy: Appoint CA and Nevada Membership Co-Chairs;
- Strategy: Disseminate membership communication to the clubs-via e-bulletins on website and in the District newsletter;
- Strategy: Work individually with smallest clubs to increase their membership;
- Strategy: Work on club extension – for example a new generation’s club in Diamond Bar/Chino Hills, Upland Foothills area, and Pasadena;
- Strategy: Encourage clubs to retain members through strong weekly programs and relevant service opportunities;
- Strategy: Continue to have a Family of Rotary Committee and a Rotary Alumni Committee;
- Strategy: Transmit to club membership chairs enquiries from prospective members about membership which have been forwarded by RI;
- Strategy: Emphasize membership development strategies during Governor’s official club visits;
- Strategy: Encourage attendance of district and club leaders at Zone Membership Seminars;
- Strategy: Identify and publish club membership chairs as per the Club Leadership Plan and list them in the District directory;

### 2. **ENCOURAGE CLUBS TO CONDUCT RELEVANT SERVICE PROJECTS**

- Strategy: Offer opportunities for joint club involvement in projects, i.e. *Project Corazon, Rotarians at Work Day*;
- Strategy: Set/communicate District goals that encourage active participation: i.e. (2) hands-on project (3) international project (4) at least one youth project at District (9) focus projects - health and hunger, literacy, water management, PolioPlus;
- Strategy: Feature stories and photos of relevant successful service projects in the District newsletter;
- Strategy: Conduct a District Awards program that recognizes success and achievement;
- Strategy: Create opportunities for clubs to share their best projects: at PETS, training seminars, Presidents Advance, Conference, at monthly meetings with Assist Governors, at Governor’s club visit;
- Strategy: Identify and publish club service project chairs as per the Club Leadership Plan and list them in the District Directory;

### **3. DEVELOP DISTRICT LEADERS -- ASSIST CLUBS IN DEVELOPING CLUB LEADERS**

Strategy: Conduct PRLS in both CA and NV;

Strategy: Conduct RI training cycle as required - District Assembly, District Team Training Seminar, PETS, District Leadership Seminar, Foundation, Membership, and Public Relations seminars, etc.;

Strategy: Involve new members on District Committees;

Strategy: Conduct Strategic Planning Committee (SPC) meetings quarterly as the best training for incoming District Governors;

Strategy: Appoint a District Training Officer and District Training Committee of not less than five Rotarians;

Strategy: Involve new Rotarians in District youth programs: TLC, Interact Symposium, RYLA, and Youth Exchange;

Strategy: Identify potential future Governor Candidates and develop their Rotary knowledge, skills and abilities through a *Leadership Academy*;

Strategy: Use experienced PDGs in District positions as advisors and in other capacities;

Strategy: Register one or two SIG's at the Zone Institute;

Strategy: Conduct two BODTS training seminars, one in California and one in Nevada;

### **4. INCREASE UNDERSTANDING OF THE ROTARY FOUNDATION WHICH WILL LEAD TO INCREASED GIVING AND INCREASED PARTICIPATION IN THE PROGRAMS**

Strategy: Conduct two Foundation seminars which will emphasize writing matching grants - one in California and one in Nevada;

Strategy: Establish Foundation Committees with multiple members to build knowledge/skills/abilities/future leadership;

Strategy: Have the District Foundation Committee & Chairs visit clubs and give programs;

Strategy: Have Group Study Exchange (GSE) Team(s) visit an increased number of clubs;

Strategy: Continue to include Foundation information in each monthly District newsletter;

Strategy: Continue to involve more clubs in the programs of the Rotary Foundation Matching Grants, GSE, Ambassadorial Scholars, etc;

Strategy: Conduct three fund-raising Foundation events;

Strategy: Develop and implement an Annual PolioPlus Giving Campaign;

Strategy: Develop and implement a Major Donor/Benefactor Campaign;

Strategy: Develop direct e-bulletin communication to Foundation Chairs in each club at least monthly;

Strategy: Identify and publish club Foundation chairs as per the Club Leadership Plan and list them in the District directory;

Strategy: Post opportunities for international projects that need funding partners through the website: [www.matchinggrants.org](http://www.matchinggrants.org);

## **5. PLACE PARTICULAR EMPHASIS ON STRUGGLING CLUBS**

Strategy: Identify "struggling clubs";

Strategy: Develop an individual approach appropriate to each club through the Vision Facilitation Team process;

Strategy: Assist Governors and/or other district leaders personally visit and communicate with these clubs on a regular basis;

Strategy: Offer clubs solutions to the following problem areas: low membership, lack of involvement of members, failure to pay dues, few or lack of service projects, lack of leadership/future leadership, non-attendance at District events, few weekly programs at meetings, not meeting regularly, failure to communicate, developing future leadership;

## **6. IMPROVE COMMUNICATIONS**

Strategy: Improve and expand website pages and links;

Strategy: Communicate with Presidents, Assistant Governors, Ex Assistant Governors;

Strategy: Develop direct communication between District Chairs and Club Chairs - example Foundation, Public Relations, and Membership chairs;

Strategy: Request Committee Chairs document their work and pass on documentation to successors; each major District project will be responsible for a final report;

Strategy: Develop a marketing plan appropriate for each major program to communicate through multiple methods;

Strategy: Encourage each club to have a weekly bulletin/newsletter and website;

Strategy: Identify and publish club public relations chairs as per the Club Leadership Plan and list them in the district directory;

Strategy: Hold two public relations seminars in the District, one in NV and one in CA;

Strategy: Develop and distribute through a Paperwork Calendar and club check list to the club presidents;

Strategy: Implement tele/video-conferencing for District Committee meetings;

## **7. IMPROVE DISTRICT COMMITTEE EFFECTIVENESS**

Strategy: Include a CA and NV Co-Chair on all major Committees as appropriate;

Strategy: Include more Nevada Rotarians on District Committees;

Strategy: Include Rotarians on committees that are new to District-level leadership;

Strategy: Develop a continuity of Committee leadership - where a member of the committee might serve as Chair the following year;

Strategy: Use Resource Rotarians where one person will do and a committee structure is unnecessary;

Strategy: Communicate the work/progress of District committees through the District newsletter;

Strategy: Involve the experienced Avenue of Service Chairs or PDGs (or DGE, DGNs) as mentors/facilitators to Committee Chairs and Committee membership;

## **8. ENHANCE YOUTH PROTECTION COMPLIANCE GUIDELINES AND ACTIVITIES**

Strategy: Maintain a Youth Protection Compliance Committee;

Strategy: Continue to conduct background checks and training for adults involved with Youth Exchange;

Strategy: Expand the training program for all adults in overnight camp activities: Interact Symposium, TLC and RYLA;

Strategy: Document all youth compliance activities and file with the District Administrator;

Strategy: Develop a spreadsheet listing names of participants and their dates of training and maintained by the District Administrator;

Strategy: Expand the number of qualified trainers in each District geographical area;

## **9. PROMOTE THE ADOPTION OF THE CLUB LEADERSHIP PLAN**

Strategy: Present BODTS workshops on the Club Leadership Plan in both California and Nevada;

Strategy: Continue to train District leadership on the Club Leadership Plan;

Strategy: Develop a District organization that supports the Club Leadership Plan;

Strategy: Make district leaders available to clubs and their boards to assist in their transition to the Club Leadership Plan;

## **10. IMPROVE THE EFFECTIVENESS OF CURRENT DISTRICT ADMINISTRATION AND ORGANIZATION**

Strategy: Continue to enhance the services of the paid, part-time Bookkeeper and maintain a current, signed, service contract;

Strategy: Continue to improve upon the services of the paid, part-time District Administrator and maintain a current, signed, service contract;

Strategy: Review the current District organization (chart) annually to determine efficiency and effectiveness;

Strategy: Review current financial process and practices - make changes to improve accountability and ease of use by Rotarians;

Strategy: Re-define the membership of the Budget and Finance Committee;

Strategy: Consider District incorporation and then necessary District reorganization;

Strategy: Develop a comprehensive compilation of District policies and procedures currently used formally and informally to assist in consistence of District decision making.