



ROTARY INTERNATIONAL DISTRICT 5300

2009-2010 STRATEGIC PLAN

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.

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
- Strive to increase PRIDE in the District

District Strengths Identified in January 09 (general categories)

- Foundation giving
- Youth programs
- Communication: Website and Newsletter
- Leadership
 - ✓ Involvement of Past District Governors
 - ✓ Continuity/constancy of purpose
 - ✓ Experienced Rotarians in leadership positions
 - ✓ Visibility of Leaders
 - ✓ Strategic Planning Committee
 - ✓ Vision Facilitation Team

District Challenges Identified in January 09 (general categories)

- Declining membership
- Declining economy
- Marketing of training programs
- Failure of Presidents to delegate/share information
- Increased demand on budgets (clubs and District)
- Over-extended Rotarians/Weak Committees
- Lack of new Rotarians serving at the District level
- Over reliance on District Administrator to do club tasks
- Lack of Communication
 - ✓ Underutilization of the website by clubs
 - ✓ Overreliance on e-mail

STRATEGIC PLAN GOALS AND STRATEGIES

1. INCREASE MEMBERSHIP

- Strategy: Conduct two Membership Development training seminars, one in California (CA) and one in Nevada (NV).
- Strategy: Appoint CA and NV 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: Support Family of Rotary and Rotary Alumni Committees.
- Strategy: Transmit to club membership chairs inquiries 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: Encourage clubs to “think outside the wheel” to retain members in the current economic downturn.

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., hands-on projects, international projects, at least one District youth project (RYLA, TLC), focus projects - health and hunger, literacy, water management, and Polio Plus.
- Strategy: Feature stories and photos of relevant successful service projects in the District newsletter.
- Strategy: Conduct a District Awards program that recognizes service projects successes and achievements.
- Strategy: Create opportunities for clubs to share their best projects at PETS, training seminars, Presidents Advance, Conference, at meetings with Assistant Governors, and at Governor’s club visit.

3. DEVELOP DISTRICT LEADERS AND ASSIST CLUBS IN DEVELOPING CLUB LEADERS

- Strategy: Promote involvement of Rotarians in District Positions—“The Future of Rotary Is in Your Hands”.
- Strategy: Conduct PRLS in both CA and NV.
- Strategy: Conduct RI training cycle as required - District Assembly, District Executive Committee Training Seminar, PETS, District Leadership Seminar, Foundation, Membership, and Public Relations seminars, etc.
- Strategy: Recruit and involve new members for District Committees.
- Strategy: Conduct Strategic Planning Committee (SPC) meetings quarterly as training for incoming District Governors.
- Strategy: Appoint a District Training Officer and develop a District Training Committee.
- Strategy: Involve new Rotarians in District youth programs: TLC, Interact Symposium, RYLA, and Youth Exchange.

Strategy: Identify potential future District Governor Candidates and develop their Rotary knowledge, skills, and abilities.

Strategy: Use experienced Past District Governors in advising capacities.

Strategy: Invite Special Invited Guests (SIGs) at the Zone Institute as the budget permits.

Strategy: Conduct two BODTS training seminars, one in CA and one in NV.

Strategy: Strive to replace Rotarians who have held positions for three or more consecutive years with new, talented Rotarian leaders.

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

Strategy: Conduct two Foundation seminars one in CA and one in NV.

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

Strategy: Encourage District Foundation Committee & Chairs to conduct programs at District clubs.

Strategy: Increase the club visits of Group Study Exchange (GSE) Team(s).

Strategy: Include Foundation information in each monthly District newsletter;

Strategy: Involve more clubs in the Rotary Foundation Matching Grants, GSE, Ambassadorial Scholars programs, and etc.

Strategy: Re-evaluate Foundation dinners and other events.

Strategy: Develop and implement an Annual Polio-Plus Giving Campaign-- continue with Polio Plus efforts started in 2008 (\$50/Rotarian/Year).

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

Strategy: Continue to direct monthly e-bulletin communication to club Foundation Chairs.

Strategy: Begin transition to Future Vision Plan.

Strategy: Post opportunities on the website – www.matchinggrants.org--for international projects that need funding partners.

Strategy: Increase number of clubs participating in Youth Exchange program.

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: Communicate regularly with struggling clubs through Assistant Governors and/or other district leaders.

Strategy: Offer clubs solutions to problems.

Strategy: Involve “area” clubs in assisting struggling clubs to ensure their growth and survival.

6. IMPROVE COMMUNICATIONS

Strategy: Improve and expand website pages and links.

Strategy: Communicate regularly with Presidents, Assistant Governors, and Executive Assistant Governors.

Strategy: Develop direct communication between District Committee Chairs and Club Committee Chairs.

Strategy: Request District Committee Chairs to document their work and pass on documentation to successors including a final report for each major District project.

Strategy: Develop a marketing plan appropriate for each major program and market programs through multiple methods.

Strategy: Strongly encourage each club to have a weekly bulletin/newsletter and website.

Strategy: Conduct two public relations seminars in the District, one in CA and one in NV.
Strategy: Expand use of tele/video-conferencing for District Committee meetings.

7. IMPROVE DISTRICT COMMITTEE EFFECTIVENESS

Strategy: Include a CA, High Desert, and NV Co-Chair on all major Committees as appropriate.
Strategy: Include more NV and High Desert Rotarians on District Committees.
Strategy: Recruit and involve new Rotarians on District committees.
Strategy: Develop a process for lines of succession for District Committees, i.e., identify committee members a year in advance to serve as Committee Chairs.
Strategy: Identify “expert/resource” Rotarians to assist clubs.
Strategy: Communicate the work/progress of District Committees through the District newsletter.

8. ENHANCE YOUTH PROTECTION COMPLIANCE GUIDELINES AND ACTIVITIES

Strategy: Maintain a Youth Protection Compliance Committee.
Strategy: Conduct background checks and training for adults involved with youth programs.
Strategy: Expand training for adults participating in youth activities, i.e., Interact Symposium, TLC, and RYLA.
Strategy: Document all youth compliance activities and file with the District Administrator.
Strategy: Track and maintain a record of youth program participants and dates of training.
Strategy: Expand the number of qualified trainers in each District geographical area.

9. PROMOTE THE ADOPTION OF THE CLUB LEADERSHIP PLAN

Strategy: Present workshops on the Club Leadership Plan in both CA and NV.
Strategy: Train District leaders on the Club Leadership Plan.
Strategy: Provide District leaders to clubs and their boards to assist in the transition to the Club Leadership Plan.

10. IMPROVE THE EFFECTIVENESS OF CURRENT DISTRICT ADMINISTRATION AND ORGANIZATION

Strategy: Enhance the services of the paid, part-time Bookkeeper and maintain a current, signed, service contract.
Strategy: Evaluate the job description 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 and make necessary changes to improve accountability and ease of use by Rotarians.
Strategy: Implement newly-defined District Code of Policies and Procedures.
Strategy: Research, evaluate, and seek bids on programs when appropriate (i.e. youth camps), to ensure we are receiving maximum cost benefits.
Strategy: Expand emphasis on ethics in all programs (we are one of the RI District Pilot Programs).