

Rotary District 5010

Strategic Plan 2016 to 2019

STRATEGIC AREAS OF FOCUS

PRIORITY 1: STRONGER, MORE EFFECTIVE CLUBS
Support and strengthen clubs

PRIORITY 2: GREATER IMPACT
Focus and increase humanitarian service

PRIORITY 3: GREATER VISIBILITY & INFLUENCE
Enhance public image and awareness

PRIORITY 4: INCREASED OPERATIONAL EFFECTIVENESS & FINANCIAL STABILITY
Build strong leadership, continuity and financial sustainability.



Rotary District 5010

Strategic Plan 2016 to 2019

Priorities, Goals & Actions

PRIORITY 1: STRONGER, MORE EFFECTIVE CLUBS

Support and strengthen clubs

<i>Action Steps</i>	<i>Year implementation will begin. Priorities will continue development after the designated year.</i>	<i>District position(s) responsible for implementation and support; if more than 1 is listed, the "lead" is indicated with a (1)</i>
<p>A. Assist clubs in identifying own membership retention and attraction needs and goals, and develop initiatives to support achievement</p> <p>- 5% net annual growth 2016 to 2019</p> <p>- increase overall member retention by 3% annually</p>	2016-17	Membership chair (1); AG
<p>B. Support clubs in developing Young Professionals initiatives to fit the needs of their own communities</p>	2016-2017	Membership chair (1); AG

<p>(<i>Young Professionals Initiatives – con't</i>)</p> <p>- 35% of clubs have implemented an initiative in 2016-17; 65% by 2017-18; 90% by 2018-19</p>		
<p>C. Assist clubs in setting up a leadership mentorship program</p> <p>- 80% of clubs have set up and are using a mentor structure in 2016-17; 90% by 2017-18; 96% by 2018-19</p>	<p>2016-17</p>	<p>Leadership development chair (1); AG; training chair</p>
<p>D. Expand number of webinars and regional training opportunities and resources for clubs to share ideas, increase knowledge and build connectively, on topics including:</p> <ul style="list-style-type: none"> - Membership engagement, retention and new member orientation - Flexible membership options and club structure - Leadership development <p>- <i>Minimum of 1 district-wide webinar or training session presented quarterly, along with corresponding tools</i></p>	<p>2016-17</p>	<p>Training chair (1); membership, leadership development and other chairs with responsibility for the specific topic of the training</p>

<p><i>Webinars and regional training opportunities – con't)</i></p> <p><i>- At least 3 members of each club participate in a live or recorded training session quarterly</i></p>		
<p>E. Develop new Rotary clubs and/or organizations which will transition to become new Rotary clubs in the future (includes Rotaract, satellite clubs, Rotary Community Corps clubs)</p> <p><i>Includes:</i></p> <ul style="list-style-type: none"> <i>- 3 Rotary Community Corps clubs by 2019 (1 in 2016-17; 1 in 2017-18; 1 in 2018-19)</i> <i>- 1 or more new Rotaract clubs by 2019</i> <i>- 2 Senior Center satellite clubs by 2017-18</i> 	<p>2016-17</p>	<p>Membership chair (1), New Generations chair, extension chair, service chair, AG (note: specific project lead may change for implementation, based on type of organization to be created, e.g., Rotaract: New Generations chair)</p>
<p>F. Assist clubs in charting a direction to a stronger future and taking steps to create a more dynamic club today.</p> <ul style="list-style-type: none"> <i>- Minimum 30% of clubs develop or update their written roadmaps and action plans annually after gathering input and feedback from members; 65% develop or update by 2017-18; 90% by 2018-19.</i> 	<p>2016-17</p>	<p>Specialized support team (1) appointed by DG; AG</p>

PRIORITY 2: GREATER IMPACT
Focus and increase humanitarian service

<i>Action Steps</i>	<i>Year implementation will begin. Priorities will continue development after the designated year.</i>	<i>District position(s) responsible for implementation and support; if more than 1 is listed, the "lead" is indicated with a (1)</i>
<p>A. Support clubs in developing and implementing a signature service project, which meets the needs of the community and attracts "outside" community support and visibility</p> <p><i>- Every club has at least 1 signature project</i></p> <p><i>- 26% of clubs have new signature project by 30 June 2017; 42% of clubs by 30 June 2018; 64% of clubs by 30 June 2019</i></p> <p>(note: this is a shared action with Priority 3: Greater Visibility & Influence)</p>	<p>2016-17</p>	<p>Service chair (1); AG; public image chair; membership chair</p>
<p>B. Increase the number of clubs with Global or District Grant projects</p> <p><i>- Each club has completed/have in progress one District or Global Grant project by 2019</i></p> <p><i>- Two or more joint Canadian/Alaskan Global Grant projects completed by 2019</i></p>	<p>2016-17 (begin development in 16-17; implement grants in 2017-18 and 2018-19)</p>	<p>Grants chair (1); Service chair</p>

<p>C. Expand number of training sessions and resources for clubs on:</p> <ul style="list-style-type: none"> - Increasing the effectiveness of service - Developing signature projects - The Rotary Foundation <p><i>- Minimum of 1 district-wide webinar or training session presented quarterly, along with corresponding tools (see 1D).</i></p>	<p>2016-17</p>	<p>Training chair (1); Service chair; TRF chair</p>
<p>D. Increase percentage of clubs which are entering service, club and TRF goals and regular progress reports in Club Central annually.</p> <p><i>- During 2016-17, 80% of clubs have entered all goals and updated with progress reports at least quarterly; 90% of clubs meeting this goal in 2017-18, 100% of clubs meeting goal in 2018-19</i></p>	<p>2016-17</p>	<p>AG (1); Administration chair</p>

PRIORITY 3: GREATER VISIBILITY & INFLUENCE
Enhance public image and awareness

<i>Action Steps</i>	<i>Year implementation will begin. Priorities will continue development after the designated year.</i>	<i>District position(s) responsible for implementation and support; if more than 1 is listed, the "lead" is indicated with a (1)</i>
<p>A. Increase the number of clubs with active, effective visibility plans which use the new Rotary brand and voice</p> <p><i>- Minimum 30% of clubs develop or update their written roadmaps and action plans annually; 65% develop or update by 2017-18; 90% by 2018-19</i></p> <p><i>- 75% of clubs are using new Rotary voice in communications</i></p>	2016-17	Public Image chair (1); AG
<p>B. Implement a collaborative district-wide service project or shared service project theme which develops non-Rotarian involvement and awareness across the district</p> <p><i>- 90% of clubs participate in implementation of a collaborative service theme or service project by 2017-18</i></p>	2017-18	Service chair (1); Grants chair

<p>C. Expand club poster project through digital media and other sources to expand community awareness and visibility throughout the district</p> <p><i>- 65% of clubs use posters at least 4 times annually for public image development in their communities in 2016-17; 90% in 2017-18</i></p>	<p>2016-17</p>	<p>Public Image chair (1); AG</p>
<p>D. Expand training, resources and actionable tools for clubs on effective public image, visibility and social media which promotes service, especially as integrated with service opportunities, membership and The Rotary Foundation</p> <p><i>- Minimum of 1 district-wide webinar or training session presented quarterly, along with corresponding tools (see 1D).</i></p>	<p>2016-17: launch implementation on a limited basis; full roll out in 2017-18</p>	<p>Training chair (1); Public Image chair</p>

PRIORITY 4: INCREASED OPERATIONAL EFFECTIVENESS & FINANCIAL STABILITY
Build strong leadership, continuity and financial sustainability.

<i>Action Steps</i>	<i>Year implementation will begin. Priorities will continue development after the designated year.</i>	<i>District position(s) responsible for implementation and support; if more than 1 is listed, the "lead" is indicated with a (1)</i>
<p>A. Ensure long-term financial stability through effective and prudent management of district finances and stewardship of TRF grant funds</p> <p><i>- Achieve positive bottomline on operations annually, fulfills reserve requirements and meets financial and stewardship policies in the Rotary International and D5010 MOPs</i></p> <p><i>- Meet or exceed annual financial thresholds and accountabilities established by the finance and TRF stewardship committees</i></p>	2016-17	<p>Finance chair and DG for district funds (1); TRF chair for grant funds (1); all district chairs and leaders for own committee budgets UPDATE -4/24/17 Youth Exchange Budget, District Budget, and RYLA all to be presented in fall to Finance committee for approval with general District Operations Budget. TRF funds will also be included in review of financial operations to ensure proper Stewardship Reserves have been reviewed and a resolution proposed at Dist Conf 2017</p> <p>Process started to appoint a Stewardship chair for the TRF funds</p> <p>Finance committee to continue close oversight of budget and review process and keep up with RI and TRF standards.</p>
<p>B. Actively utilize the district long-range plan to guide annual district operations</p> <p><i>- Strategic plan guides district direction on a rolling 3-year basis and is updated annually per the D5010 MOP.</i></p>	2016-17	<p>Strategic planning chair (1); DG/DGE/DGN/DGND; all district committees and leaders UPDATE 4/24/17 Strategic plan has specifically been used in budgeting finances for 2017-18 year. DGE and DGN have committed to continuing the process of budgeting and updating the Strategic Plan</p>

<p>- Annual work plans developed by district committees in coordination with strategic goals; progress reviews conducted bi-monthly; communications to clubs monthly about plan outcomes</p>		<p>4/17 Major Committees will be involved in developing their budgets each year. Communication to clubs changed to quarterly and all updates timely posted to documents on website – available to all.</p>
<p>C. Increase strength of district leadership while supporting achievement of plan goals through use of written team charter, responsibilities and accountabilities for each district position.</p> <p>- Written team charters and accountabilities for all leadership positions completed in 2016-17 for full implementation in 2017-18. Position descriptions implemented in 2017-18; annual reviews/update process launched in 2018-19</p>	<p>2016-17</p>	<p>Administrative chair (1); Leadership Development chair; individual committee chairs Update 4/2017 most Committees have met and filled out position descriptions. These will be posted on Website – accessible to all and updated annually. This will be a continuing process and reviewed each year with the Strategic Plan.</p>
<p>D. Create an active committee mentoring system for future district leaders</p> <p>- Mentor structure developed and introduced in 2016-17 with 60% of committees using the structure; 100% of district leaders and committees using mentor system in 2017-18</p>	<p>2016-17</p>	<p>Leadership Development chair (1); AG UPDATE 4/17 DGE and DGN to work on appointing a Leadership Chair for 2017-2020 Leadership group is reviewing the eLearning site currently used for the District Leadership Academy. This should work to place one-off Classes such as pre-grants seminar information. As webinars and classes are developed along with those at RI site, all members will have access to areas they feel will enhance their knowledge of Rotary. The 3-year rule for committees and chairs will be used for all major committees to train and mentor future leaders.</p>

Thank You

Sincere thanks to the following D5010 Rotarians who dedicated time and energy for nearly seven months to participate in and provide leadership to D5010's strategic planning process.

District 5010 Planning Work Group

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