

District Strategic Plan

Mission of Rotary District 5060

The mission of Rotary District 5060, a district straddling the boundary of Canada and the United States, is to assist the meaningful work of clubs and Rotarians by providing leadership, administrative, training and development support so that clubs advance humanitarian service, encourage participation in Rotary International Programs, and advance the work of the Rotary Foundation. We will be recognized as a premier Rotary District through the service provided by our clubs to make a difference in the world, in their communities and in themselves. We will accomplish our mission in ways that advance the core values of Rotary - fellowship, integrity, diversity, service and leadership

District 5060 Strategic Priorities

District 5060s strategic priorities are:

1. Advance Administrative and Organizational Effectiveness;
2. Grow Engaged Membership;
3. Enhance Humanitarian Service and Support the Rotary Foundation; and
4. Build Rotary's Public Image and Brand.

Our priorities support the four new strategic priorities of Rotary International which are formally in effect from 1 July 2019:

- Increase Our Impact;
- Expand Our Reach,
- Enhance Participant Engagement; and
- Increase Our Ability to Adapt.

Why a District Multi-Year Strategic Plan?

Multi-year plans have been in place for a number of years in our District. There are many reasons behind the need for multi-year plans that include the following.

First, a strategic plan provides for continuity and consistency of broad direction and focus from year-to-year. Second, they demonstrate, to our District's current 57 clubs, a consensus of direction on the part of the District's leaders that is congruent with the direction of Rotary International. Finally, a focus on key priorities, when accompanied by tangible actions, is helpful to club leaders in sorting out their annual priorities and budget allocations.

We know from experience that the strategic planning approach needs to be streamlined, focused and possess demonstrable utility. District 5060 four strategic priorities need to be based on the consensus and commitment of the District Leadership Team. They need to be developed, also, for the assignment of responsibilities and accountabilities in their implementation if they are to serve as more than a list of broad and well-meaning intentions.

Goals & Plans 2019-2020

1. Advance Administrative and Organizational Effectiveness

District 5060 will provide leadership, training, support and motivation to its ~60 clubs to carry out and deliver humanitarian service projects and participate in a range of related Rotary programs. A focus will be directed to leadership development and training at the club level. District 5060 will improve measuring, reporting and promoting the results and outcomes of the club's work. We will ensure that our operating and governance structures are efficient, flexible and effective in delivering all five Avenues of Service.

GOALS (2019/ 2020)	KEY DISTRICT SUPPORTING ACTIONS
1.1. Develop new and more flexible ways for the District Governor to visit, support and interact with all clubs (<i>Lead: District Governor</i>).	<p>Develop District-wide video storage and distribution capabilities for all areas relating to the District priorities.</p> <p>Produce a "District Governor's Message" that can be delivered to all clubs during the initial weeks of each Rotary year.</p> <p>Create a variety of optional choices for all visits that the District Governor can physically make to clubs that will support the needs and interests of the clubs individually.</p>
1.2. Continue the District's significant commitment and investment in training programs for club leaders (<i>Lead: District Training Chair & District Governor Elect</i>).	<p>Continue the District's investment and support for the Rotary Learning Institute, Club Visioning and Planning, Membership Matters, The Rotary Foundation and Public Image.</p> <p>Encourage all District Leaders, including all Assistant Governors and Committee Chairs to become RLI Graduates.</p> <p>Encourage all clubs to plan for their Club President-Elect and Club President-Nominee to complete RLI before assuming duties as President.</p> <p>Provide opportunities for developing Rotarians to assume leadership roles in the District.</p> <p>Review the effectiveness of the training program on an on-going basis and make changes as necessary.</p>
1.3. Pursue streamlined governance, structures and processes, as well as build a culture of research, innovation and acceptance of reasonable risk (<i>Lead: District Leadership Team</i>).	<p>District leaders, including the Assistant Governors, actively promote, profile and support new and innovative approaches.</p> <p>Assistant Governors work with Club Presidents to review the club constitutions and bylaws to identify changes that can streamline the governance and administration of clubs.</p>

1.4. Activate the "The Strategic Assistance Committee", composed of club and District leaders, who will come into a club or area identified by either the Governor's Council or the District Leadership Team as requesting assistance with challenges (<i>Lead: District Governor</i>).	<p>The committee will be appointed by the District Governor in July 2019 and function in accordance with <i>District 5060 Manual Policies, Procedures and Practices</i> (2019).</p> <p>The committee, in confidence, will help develop a plan of action which can be followed by local club members and monitored for success by the appropriate Assistant Governor.</p>
1.5. Actively encourage the effective use of Rotary Club Central to identify each club's membership, foundation and service goals and implementation status for the next Rotary Year (<i>Lead: Governors Council</i>).	<p>The Assistant Governors will work actively with clubs in their respective Areas. A regular reporting schedule will be developed, and the results shared with the District Governor.</p> <p>By the end of February 2020, 100% of the club's in the District will have entered their goals.</p> <p>Increase the awareness of information and resources available via the MyRotary website.</p>

2. Grow Engaged Membership to Strengthen Clubs

Club effectiveness will be strengthened by increasing membership and enhancing the engagement of existing members. The District will work with clubs to increase the number of members and promote member diversity. Help will be provided to engage existing members by assisting clubs to focus on the experience and value they give their members, as well as to create new clubs with innovative, varied and flexible meetings and bylaws. These steps, together, provide meaningful ways to unite and advance the 'Object of Rotary' and will result in attracting a diverse range of new members and keeping existing members engaged. As a District, we will work together to achieve this goal and report annually on our performance and celebrate our successes and lessons learned.

GOALS (2019/ 2020)	KEY DISTRICT SUPPORTING ACTIONS
2.1. Actively promote and expand the development of new District "Chapter 1" clubs (<i>Lead: District Membership Chair</i>)	<p>Inform district and club leaders of the new Chapter 1 program and where to find information or support.</p> <p>Help clubs create innovative new ways to approach potential new members for all club types including Chapter 1 (Satellite) clubs, traditional legacy clubs, and new Rotaract clubs.</p>
2.2. Continue to offer a coordinated range of quality training programs that focus on attracting new Rotarians, as well as engaging and keeping existing members (<i>Lead: District Training Chair</i>).	<p>Continue focus on training through the Rotary Learning Institute, and District initiatives relating to Club Visioning and Planning, Membership, The Rotary Foundation and Public Image.</p> <p>Promote leadership development and enhance members' Rotary knowledge, whenever feasible, at District seminars and conferences.</p>

	<p>Opportunities will be provided for developing Rotarians to assume leadership roles in the District to address succession needs.</p> <p>Conduct on-going reviews of the effectiveness of training initiatives and adapt as necessary.</p>
<p>2.3. Every club in the District will be strongly encouraged and supported to prepare, by December 2019, a "Club Membership Strategy" that is based on best membership practices with specific goals, targets and supporting actions (Lead: District Membership Chair).</p>	<p>A concise District template will be developed by the District Membership Chair and promoted with clubs by the District and the Assistant Governors.</p> <p>By the end of November 2019, the Assistant Governors, will have approached every club regarding conducting a "Membership Matters" session, as well as developing and implementing a club membership strategy for the remainder of 2019/2020. Assistant Governors will report to the District Governor on the success rate in their Area.</p> <p>Promote and continue to use the ClubRunner "member management software".</p>
<p>2.4. The District will assist clubs in implementing a range of initiatives to gain a net increase of at least one new member each year over the next three years and diversify membership (Lead: District Membership Chair).</p>	<p>Conduct a classification study of club members' occupations, and help clubs to align their membership with their community</p> <p>Best practices in the District will be shared and successes celebrated.</p> <p>District 5060 membership will receive a net membership increase of 180 members by the end of 2021/ 2022.</p>
<p>2.5. Club recognition award program will be continued that profiles meritorious performance by clubs reaching their specific and measurable membership-related targets. (Lead: District Membership Chair with District Awards Chair & Governor).</p>	<p>Membership Chair and Awards Chair will prepare appropriate awards in advance of the annual District Conference.</p>

3. Increase Humanitarian Service and Support the Rotary Foundation

The District will work with clubs to identify and undertake significant humanitarian service projects that engage as many members and partners as possible. This provides an opportunity for potential media focus for clubs and for Rotary and, most importantly, delivers an outcome that helps people in need - both locally and internationally. A focus will be directed on advancing and coordinating the delivery of new Youth Service projects.

Support of The Rotary Foundation is crucial to advancing humanitarian service. The District will continue to promote the mission of The Rotary Foundation. It will support increased and informed member contributions so as to enable Rotarians to advance world understanding, goodwill, and peace, through

the improvement of health – including the eradication of polio, the support of education, and the alleviation of poverty. Support for member contributions to The Rotary Foundation will occur by continuing to streamline procedures for District Grant applications, as well as maintaining support and training for clubs pursuing Global and District grants.

GOALS (2019/ 2020)	KEY DISTRICT SUPPORTING ACTIONS
3.1. Encourage, train and support clubs to prepare multi-year plans that identify the club's priority service projects and supporting implementation requirements (<i>Leads: Assistant Governors with Visioning and Strategic Planning Chairs</i>).	<p>Expand focus on effectively planning and implementing priority service projects.</p> <p>Continue and expand training for the District's "Club Visioning and Plan Implementation".</p> <p>Help Clubs that want to establish a "Signature Project" that is recognized in their communities.</p> <p>Work with clubs to fully utilize <i>Rotary Club Central</i> for recording, monitoring and reporting on service goals.</p>
3.2. A new District Youth Services/ Young Professionals Committee will be created to assist the development, delivery and coordination of all youth programs. This will include attracting and engaging younger professionals, mentoring and leadership programs. (<i>Lead: District Governor Nominee</i>).	<p>Establish and expand the mandate of the Youth Services Committee.</p> <p>Encourage each club to sponsor a Youth Exchange student and RYLA participant.</p> <p>Foster and expand a strong "Rotex" (past Rotary Exchange Student) program.</p> <p>Work with the Membership Chair to coordinate promotion of new Chapter 1 clubs with Youth programs.</p>
3.3. Enhanced promotion of The Rotary Foundation. Support for member contributions is improved by continuing to streamline procedures for District Grant applications, as well as maintaining support and training for clubs pursuing Global and District grants. (<i>Lead: District Foundation Chair and Assistant Governors</i>).	<p>The AGs will work with the respective Club President's to ensure that training and information is available for the club Foundation chairs.</p> <p>The District Conference will continue to be used as a key opportunity to promote the TRF and the District's contribution targets.</p> <p>By April 2020, one-third of the clubs in the District will have applied or be in the process of applying for a District Grant and three clubs will be in a similar position regarding Global Grants.</p> <p>Annual reporting of the success of grant applications will be made available throughout the District, and the success of clubs in advancing service projects, with the assistance of TRF grant funding, will be profiled as part of a future District award programs.</p>
3.4. District 5060 will continue to encourage contributions for a 10% increase to the annual fund and the Endowment Fund. Education and promotion will be a key focus, with the goal of adding 5% new Paul Harris	Clubs that meet specific and measurable targets established by the District will be recognized.

Society members, 10% new Bequest Society members and 15% more Benefactors. (Leads: <i>District Foundation Chair and Awards Chair</i>).	
3.5. Continue to support and assist clubs to contribute to polio eradication (Lead: <i>District Foundation Chair</i>).	<p>District 5060 will maintain the rare distinction of being a "20% District" Globally, by contributing 20% of their District Designated Fund (DDF) to the Polio-Plus program.</p> <p>Encourage clubs to hold an event to raise funds for, and increase awareness of, Rotary's work towards polio eradication.</p>

4. Build Rotary's Public Image

As a District, we will work to promote and elevate a positive public image of Rotary as "The Place to Be". Advancing this initiative will build community support, attract new members and maintain pride and engagement within Rotary. It requires, also, accepting a culture that building Rotary's image is embodied in everything that we think, say or do!

GOALS (2019/ 2020)	KEY DISTRICT SUPPORTING ACTIONS
4.1. Enhanced training and technical support will be provided to clubs so that public messaging is effective, consistent, focused and targeted. (Lead: <i>District Public Image Chair</i>).	<p>We will implement best practices – programs that have been successful in other districts, as well as, use of Rotary's brand guidelines, templates, 'People of Action' campaign materials, and related resources.</p> <p>Quantitative measurements of success, involving widespread surveys, are costly. Success will be measured, therefore, through regular reporting by the AGs on the performance of clubs in developing and implementing their public relations strategy.</p>
4.2. Develop and implement a District Communication Strategy. The strategy will address such topics as club training needs, the effective use of social media, as well as the club websites to ensure that messaging is informative, consistent, up-to-date and easy to use.	<p>The District Public Image Chair, in consultation with the Assistant Governors, will determine training needs to support clubs in advancing public image priorities, attracting media interest, making available ready-to-use materials, and delivering targeted messaging. Required training will be provided early in 2019/ 2020.</p> <p>Promote the use of Rotary Club Central and Rotary Showcase as a useful way to not only promote projects globally, but to also seek international project partners.</p>