



February 20, 2020

Rotary District 5470 2019-2022 Strategic Plan

Strategic priority 1: Redesigning District Training

Annual Goals	Rotary International Action Plan	2019-20	2020-21	2021-22
Improve RLI District Trainer RLI Co-Chairs	1. Increase Impact 3. Enhance Participation/Engagement	Implement the Four Quadrant approach. Identify venues in the quadrants.	Rotate the RLI and Assemblies to the preassigned quadrants. Integrate AG's into RLI Training Create a RLI Master Training Plan for the District	Evaluate RLI progress. Create RLI Graduate Study Program Implement the RLI Master Training Plan
Improve PETS District Trainer	1. Increase Impact 3. Enhance Participation/Engagement	Propose scheduling change to High Country PETS Committee Evaluate District 5470 PETS Training	Implement the new PETS training schedule Create a Master Training Plan for the District Portion of Pets	Evaluate and adjust the PETS training schedule Execute the Master Training Plan for District Portion of PETS

Define Emerging Leaders Governor Line, Assistant Governors and Club Officers	3. Enhance Participation/Engagement 4. Ability to Adjust	Create a list of skills and attributes that can be identified in future emerging leaders Ask clubs to nominate 1-2 emerging leaders Ensure that EL's attend at least 1 RLI training and District Assembly	Create an Action Plan to train emerging leaders Integrate RLI grads to various District committees	Evaluate and adjust Emerging Leaders Action Plan
Restructure Assembly District Trainer	2. Expand our Reach 3. Enhance Participation/Engagement 4. Ability to Adjust	Determine leadership needs of districts Evaluate Assembly Training	Create an Assembly Training Action Plan Implement Assembly Action Plan	Evaluate and adjust the Assembly Training Action Plan
Succession Planning District Governor Line and Assistant Governors	4. Ability to Adjust	Develop strategies with help of AG's to support clubs in succession planning Develop strategies to support District Staff succession planning	Develop strategies to support club succession planning Implement strategies for District Staff succession planning	Evaluate and adjust District strategies for succession planning
Assistant Governor Training	2. Expand our Reach 3. Enhance Participation/Engagement 4. Ability to Adjust	Develop the training plan for all AG's	Implement the training plan	Evaluate and adjust the training plan

Strategic priority 2: Building District 5470 Infrastructure

Annual Goals	Rotary International Action Plan	2019-20	2020-21	2021-22
Update Policies District Admin and Management Chair	4. Ability to Adjust	Identify District policies that address the most pressing district needs. Focus for this year will be: Sexual Harassment Youth Protection Diversity	Create District policies that address the most pressing district needs.	Review District policies.
Revise District Budget Process Governor Line, District Treasurer and District Finance Committee	4. Ability to Adjust	Create 3 Year Rolling Budget (with adjustments in January)	Implement District three year budget Evaluate budget for current Update Budget for new year	Review success/failures of year 1 implementation. Make adjustments to Year 2 budget as necessary Implement year 2 of the 3 year budget Update Budget for new year
Strategic Planning Governor Line, Assistant	4. Ability to Adjust	The G-Line will develop a 3 year SP.	Implement the District Strategic Plan Evaluate District Strategic Plan	Evaluate and update District Strategic Plan Adjust and Revise District Strategic Plan

Governors and District Staff			Adjust and Revise District Strategic Plan	
Redesign District Administrative Structure Governor Line, Admin and Management Chair and District Board of Directors	4. Ability to Adjust	Create a district board position for Fund Raising. Create a district position for Administrative Assistant. Create a district position for a Chief of Staff to assist the DG with all administrative tasks. Include evaluation process. Identify and define the tasks that will develop guidelines to improve effectiveness of AG's.	Review and adjust guidelines that will improve effectiveness of AG's. Evaluate the need for a District Fundraiser Board position Develop and implement, outcomes and strategies for a Leadership Team retreat	Develop district application form and process selection for AG's. Evaluate and adjust the goals and outcomes for the Leadership Team Retreat

Strategic priority 3: District Membership / Attracting and Engagement

Annual Goals	Rotary International Action Plan	2019-20	2020-21	2021-22
Increase Net District Membership by 5-10% per year. Membership Chair and Committee	2. Expand our Reach	Create District Membership Master Plan	Implement and Evaluate District Membership Plan.	Evaluate and adjust Membership Plan
Start a new club or satellite club in each District Quadrant (area). Governor Line, Assistant Governors, Club Presidents, District Membership Chair	2. Expand our Reach 3. Enhance Participation/Engagement 4. Ability to Adjust	Conduct a needs analysis and survey of the quadrants (areas) for club realignment and expansion	Create Master Plan for New Club Growth Implement New Club Growth Master Plan	Implement New Club Growth Master Plan

Start a Rotaract Club in each quadrant (area). Governor Line, Assistant Governors, Club Presidents, District Membership Chair	2. Expand our Reach 3. Enhance Participation/Engagement	Conduct a needs analysis and survey of the quadrants (areas) for club realignment and expansion	Create Master Plan for Rotaract Club Growth Implement Rotaract Club Growth Master Plan	Implement Rotaract Club Growth Master Plan
Support clubs in their effort to increase membership Membership Chair	2. Expand our Reach	Develop and implement the Insta-Grant Program Expand the Membership Committee to include AG's	Evaluate and adjust the Insta-Grant Program	Gather a collection of Successful Strategies from clubs with growing membership. Develop a communication plan to share the strategies
Engagement TBD	3. Enhance Participation/Engagement	Develop strategies to support club efforts to increase member engagement		
Increase the awareness for the People of Action campaign Public Image Chair	2. Expand our Reach	Share "Together We" posters at all district events	Give each club a "Together We" poster with a photo of their own club members Train club PR Committees to make their own posters	Provide Insta-Grant funds to publish/boost "Together We" posters via local media

Strategic Priority #4 Building Rotary Foundation Giving

Annual Goals	Rotary International Action Plan	2019-20	2020-21	2021-22
Increase the number of Donors in the District with EREY, Paul Harris Fellows, and Paul Harris Society	1. Increase Impact 3. Enhance Participation/Engagement	Stress the importance of individual contributions to TRF. Encourage clubs to use club assemblies to educate members of the benefits of donating to TRF	Strengthen the Foundation committee with better defined roles. Develop Foundation programs to be presented to clubs both in person and by video. Increase EREY across the district by 10% Reestablish a foundation dinner in the District	Continue to use Foundation committee members to deliver in person programs to clubs. Build on the EREY campaign previously developed. Use District Paul Harris points for special recognition in the District.
Achieve 100% club participation in donating to TRF Annual Fund, Polio Plus and Endowment	1. Increase Impact 3. Enhance Participation/Engagement	Work with noncontributing clubs showing the advantages of being part of the TRF. Continue to promote Polio Plus and why we need to keep our promise to the world.	Use all club visits by any District Staff members to continue stressing the importance of participation in TRF. Polio Plus continues to be the primary focus of RI, keep this in front of clubs.	Achieve 100% of clubs in the district that are participating with donations to TRF Polio Plus continues

Voluntary club collaboration effort in a global grant. Increase the number of clubs applying for Distract Grants	1. Increase Impact 2. Expand our Reach 3. Enhance Participation/Engagement	Better inform clubs of DDF funds available for District Grants. Explain how easy the District Grant process can be.	Create Video training for clubs as to the steps necessary to formulate a Global Grant Monthly advise clubs of Global Grant opportunities. Increase the number of clubs applying for a District Grant by 5 clubs over the previous year.	Continue to assist clubs as they develop their District and Global Grant involvement. Keep clubs advised as to amount of District DDF available.
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Strategic Priority #5 Building the Rotary Brand Experience

Annual Goals	Rotary International Action Plan	2019-20	2020-21	2021-22
Create District Governor Visit Experience Program (DGVE) Program	1. Increase Impact 2. Expand our Reach 3. Enhance Participation/Engagement	Establish a Pilot program to leverage the District Governor Club visits to create an opportunity for clubs to run: Power of One Membership Drive Rotary Foundation Fund Raiser	Expand and refine the District Governor Visit Experience Maintain relationships with community leaders based on DGVE Program	Expand and refine the District Governor Visit Experience Maintain relationships with community leaders based on DGVE program

		<p>Leadership Development Engagement</p> <p>Community Leader Engagement</p>		
Establish Quadrant PIO's to work with the AGs	<ol style="list-style-type: none"> 1. Increase Impact 2. Expand our Reach 3. Enhance Participation/Engagement 	Identify and empower a qualified and motivated PIO for each of the four quadrants to assist the AGs	Quadrant PIOs identify and empower Area PIOs and initial club PIOs	Quadrant and Area PIOs expand and identify, empower and equip local club PIOs
Create an annual District PIO Communication and Marketing Campaign across all communications channels for internal District communications	<ol style="list-style-type: none"> 1. Increase Impact 2. Expand our Reach 3. Enhance Participation/Engagement 	<p>Establish District Communication Channels across all sources and modern channels of media both online and off line to:</p> <p>Build Trust in the Rotary Community of District Leadership</p> <p>Build the Engagement of the District Rotary Tribe across District Strategic Plan Areas</p>	<p>Expand and refine the District Marketing and Communications Campaign</p> <p>Implement Quadrant Marketing and Communications Campaigns</p>	<p>Expand and refine the District and Quadrant Marketing and Communication Campaign</p> <p>Implement Area and Club Marketing and Communication campaigns</p>

<p>Create an annual District PIO Communication and Marketing Campaign across all communications channels for external communications</p>	<ol style="list-style-type: none"> 1. Increase Impact 2. Expand our Reach 3. Enhance Participation <p>/Engagement</p>	<p>Establish District Communication Channels across all sources and modern channels of media both online and off line to:</p> <p>Engage Targeted Local Communities in each quadrant to expand Rotary awareness and relationship</p> <p>Build the Engagement of Targeted Local Communities with Rotary Clubs</p>	<p>Expand and refine the District Marketing and Communications Campaign with additional local communities and organizations within the quadrants</p> <p>Implement Quadrant Marketing and Communications Campaigns with local communities, and organizations.</p>	<p>Expand and refine the District and Quadrant Marketing and Communication Campaigns to additional communities and organizations within the quadrant</p> <p>Implement Area and Club Marketing and Communication Campaigns with local community organizations to increase engagement on a club level.</p>
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