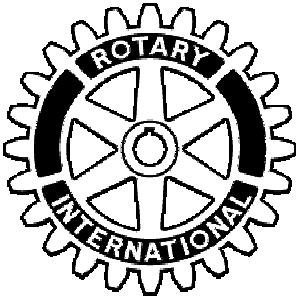


Final Draft March 4, 2008



ROTARY INTERNATIONAL DISTRICT 5550

2008-2010 STRATEGIC PLAN

Long Range Planning....

Strategic Planning....

Visioning

Whatever you call it . . .EQUALS

Pulling in the same direction with a common destination in mind...

Introduction

Rotary International first embarked on a strategic planning initiative in 2001-2002 to place more emphasis on long range planning and to establish a vision for the future of Rotary. District 5550 established a District Strategic Planning Committee in 2001 and developed an initial Strategic Plan in 2002.

In 2007 the RI Board of Directors approved a 2007-2010 Strategic Plan that established the mission, vision, core values, and priorities for RI. The Rotary Foundation has also established a Future Vision Plan to guide the organization over the next 10 years.

RI is encouraging all clubs and districts to think strategically because planning throughout the entire organization will lead to far greater successes, both locally and internationally. Clubs and districts can use the priorities in the RI Strategic Plan as a basis for developing their own plans, tailoring them to their size, the varied skills of their membership, and the needs of the communities in which they serve.

DGN Nancy Morris
Chair, Strategic Planning Committee
District 5550
March 2008

STRATEGIC PLAN FOR DISTRICT 5550

District 5550 has chosen to integrate its strategic planning efforts with the RI 2007-2010 strategic plan with six (6) strategic priorities and on an understanding that ***“the activities and organization of a Rotary district shall exist solely to help the individual club advance the object of Rotary.”***

The Strategic Plan for District 5550 will evolve and be updated each year to:

- ❑ Enable the Governor and the District Leadership Team to **set annual District goals** to achieve desired outcomes over the long term.
- ❑ Assign each of the plan's priorities to an appropriate **District committee** for further planning, implementation, monitoring, and reporting back to the District and its clubs.
- ❑ Review and establish objectives to **track progress** in achieving the goals
- ❑ Strike off completed goals and objectives as we progress
- ❑ **Involve clubs** in identifying new district issues to be addressed
- ❑ Add new goals, objectives, and possible approaches to district issues as they are identified

MISSION AND VISION

The **mission of Rotary International**, a worldwide association of Rotary clubs, is to provide service to others, promote high ethical standards, and advance world understanding, goodwill, and peace through its fellowship of business, professional, and community leaders.

The **vision of Rotary International** is to be universally recognized for our commitment to Service Above Self to advance world understanding, goodwill, and peace.

The **mission of The Rotary Foundation** is to enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty.

CORE VALUES

Rotary's core values represent the **guiding principles** of the organization's culture, including what guides members' priorities and actions within the organization.

Values are an increasingly important component in strategic planning because they drive the intent and direction of the organization's leadership.

- ❑ **Service**
- ❑ **Fellowship**
- ❑ **Diversity**
- ❑ **Integrity**
- ❑ **Leadership**

All of these core values are reflected in the **Object of Rotary** and **The Four-Way Test**, which we use in our daily lives. They inspire us to foster and support the ideal of service for developing and maintaining high ethical standards in human relations.

RI STRATEGIC PRIORITIES

The 2007-2010 RI Strategic Plan includes seven priorities, each supported by a set of goals.

1. Eradicate polio
2. Advance the internal and external recognition and public image of RI
3. Increase Rotary's capacity to provide service to others.
4. Expand membership globally in both numbers and quality.
5. Emphasize Rotary's unique vocational service commitment.
6. Optimize the use and development of leadership talents within RI.
7. Fully implement the strategic planning process to ensure continuity and consistency throughout the organization.

The Future Vision Plan for The Rotary Foundation includes five priorities:

1. Simplify all programs and operations.
2. Align program outcomes/descriptions with the Future Vision Plan.
3. Increase participation and sense of ownership at district and club levels.
4. Provide sufficient resources to achieve the program goals.
5. Develop a business model that supports the Future Vision Plan.

DISTRICT STRATEGIC PRIORITIES

The purpose of the District strategic plan is to help the district governor and the District leadership team to better serve clubs, thus enabling the district as a whole to function more effectively based on six strategic priorities

1. **Expand membership** across the District.
2. Encourage financial **support for The Rotary Foundation** and participation in educational and humanitarian programs.
3. Support and promote active involvement of clubs in rotary **service** programs.
4. Support and promote active involvement of clubs in rotary **fellowship** programs and activities
5. Encourage and support initiatives to **enhance public awareness** of Rotary in our communities.
6. Development of an **effective team of district and club leaders** to strengthen rotary at both the district and club level.

CLUB LEADERSHIP PLAN

The Club Leadership Plan is based on the best practices of effective Rotary clubs. These best practices include developing long-range goals that address the elements of an effective club and annual goals to support them:

- Sustain and/or increase its **membership** base.
- Implement **successful projects that address the needs** of its community and communities in other countries.

- ❑ **Support The Rotary Foundation** through both financial contributions and program participation.
- ❑ **Develop leaders** capable of serving in Rotary at and beyond the club level.

DISTRICT 5550 STRATEGIC PRIORITIES (2008-2010) GOALS AND DESIRED OUTCOMES

Strategic Priority #1: Membership Development

Goal: Support Club efforts to expand membership across the District.

District Role: Identify, market and implement membership recruitment, retention and extension strategies that are appropriate for the district and will result in membership growth and fellowship to include the family of Rotary.

Desired Outcomes:

- ❑ Overall net membership increase
- ❑ Increase in number of clubs achieving net increase in membership year over year.
- ❑ Number of new clubs formed based on Club and District extension efforts.
- ❑ Improvement in retention rates with greater efforts to include Family of Rotary.

Tactics:

- ❑ Develop strategies **based on best practices** that will help clubs to achieve a net increase in membership with emphasis on both recruitment and retention.
- ❑ Develop and implement a District and Club Extension Plan to charter new clubs.

Strategic Priority #2: Support for The Rotary Foundation

Goal: Encourage financial support for The Rotary Foundation and participation in international education and humanitarian programs.

District Role: educate, motivate and inspire District Rotarians to participate in Foundation programs and fundraising activities

Desired Outcomes

- ❑ Average annual giving per capita exceeds \$100.00 based on Every Rotarian Every Year goal for RI.
- ❑ Increase in number of benefactors and members of bequest society members to support Permanent Fund.
- ❑ Increase in number of applications received for TRF education and humanitarian programs

- ❑ Club and District support for final push to eradicate polio.

Tactics:

- ❑ Encourage and help clubs to set and achieve goals to support for the Annual Program Fund and the Permanent Fund.
- ❑ Promote use of District Designated Funds to increase level of Club involvement with Polio Plus and TRF Grant Programs
- ❑ Promote and encourage more club involvement in recruitment of candidates for Rotary Educational Programs such as Group Study Exchange, Ambassadorial Scholarships and Rotary Peace Programs.

Strategic Priority #3: Rotary Service Programs

Goal: Support and promote active involvement of clubs in Rotary service programs activities.

District Role: support club involvement in Rotary service programs to increase our efforts to provide service to others.

Desired Outcomes:

- ❑ Number of new Rotaract and Interact Clubs formed.
- ❑ Number of youth and clubs participating in Rotary sponsored youth programs.
- ❑ Number of clubs actively involved in a World Community Service and Community Service projects.

Tactics:

- ❑ Encourage more clubs to sponsor and charter new Interact and Rotaract Clubs.
- ❑ Encourage more Clubs to actively promote and recruit students to participate in Rotary sponsored Programs for youth including Youth Exchange, and RYLA.
- ❑ Encourage and help clubs to participate in a world community service project and a local community service projects with special emphasis on Literacy, Health and Hunger, and Water.

Strategic Priority #4: Rotary Fellowship Programs

Goal: Support and promote active involvement of clubs in Rotary fellowship activities.

District Role: support club involvement in Rotary fellowship activities to increase our capacity to retain and recruit members, develop leaders, as well as strengthen a key foundation component for Rotary service,

Desired Outcomes:

- ❑ Number of clubs with organized fellowship activities (ex. Family of Rotary)
- ❑ Club representation/participation (number) in District-related and District organized functions.
- ❑ Club representation/participation in the RI Convention.

Tactics:

- ❑ Encourage clubs to establish and/or maintain rotary fellowship activities for the good of “The Family of Rotary.”
- ❑ Encourage Clubs to actively participate in District-related and District educational and fellowship events, including District Assembly, District Conference, and International Goodwill Weekend.
- ❑ Encourage clubs to participate in a RI Convention event periodically.

Strategic Priority #5: Enhancing Public Awareness of Rotary

Goal: Encourage and support initiatives to enhance public awareness of Rotary in our communities.

District Role: to assist clubs in promoting Rotary to external audiences so as to foster understanding, appreciation and support for the programs of Rotary.

Desired Outcomes:

- ❑ Number of club initiated public events/activities in a Rotary year
- ❑ Number of District initiated public events/activities in a Rotary year
- ❑ Number of newspaper articles, advertisements, and radio/TV segments in the District logged/recorded indicating a basis for achieving improved level of public awareness of what Rotary is and the good works it supports.

Tactics:

- ❑ Provide workshops, web seminars, sessions on public relations tools and methods for clubs
- ❑ Promote awareness among Rotarians in the District that effective external publicity, favorable public relations and a positive image are desirable and essential goals for Rotary.
- ❑ Identify resources and support provided by RI to help clubs

Strategic Priority #6: Building District Leadership Capacity

Goal: Sustain an effective team of district and club leaders to strengthen Rotary at both the district and club level.

District Role: Implementation of the District Leadership Plan to better serve clubs and encourage implementation of the Club Leadership Plan, thus enabling the district as a whole to function more effectively.

Desired Outcomes:

- ❑ Greater efficiencies for District and Club Administration.
- ❑ Development of leaders capable of serving in Rotary at the club and district level.
- ❑ District communications are responsive to the needs of Clubs
- ❑ Club support and approval of annual district dues based on District financial plan and annual budget.
- ❑ Adoption of the Club Leadership Plan by all clubs in District 5550.

Tactics:

- ❑ Implementation of the District and Club Leadership Plans as recommended by RI.
- ❑ District Training plan to support development of club and district leaders.
- ❑ District communication plan to provide the necessary and timely flow of information and support to help clubs achieve their goals.
- ❑ Development of an annual financial plan and budget to provide effective management of resources by the District and demonstrate need for any changes in annual District dues or assessments.