Rotary District 5710

Rotary Action Plan

Draft

June 16, 2024

Rotary District 5710

Absence of goals

"In the absence of clearly defined goals, we become strangely loyal to performing daily acts of trivia."

Author unknown

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Rotary Vision Statement

Together we see a world where People unite and take action to Create lasting Change across the globe in our communities and in ourselves
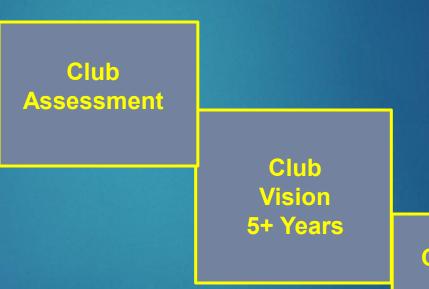
Rotary District 5710
Today's Presentation

There are two sections:

- "How To" for Clubs

- Emerging District Action Plan

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Planning Process

District Strategic Vision & Action Plan

Club Assessment

Club Vision 5+ Years

Club Action Plan 3 Years Out

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How to Get Started – Planning Team and Club Assessment

- **Form a Planning Team – president, past president, president elect, vice president, and action planner.**
  - **Action planner can be one of the above**
  - **Review Rotary International strategic plan**
  - **Review district vision and action plan**
- **Survey your club**
  - **Conduct club health check**
  - **Enhancing the Club Experience member survey**
  - **Discuss the results with members**

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How to Get Started cont'd.

- **Develop a strategic vision – where do we want to be in 5-10 years. What kind of club do we want to be?**
- **Identify strengths and weaknesses (3 or 4 is fine) to address over the next <u>three years in your action plan, that move in the direction of your strategic vision.</u>**
- **Prepare a draft action plan and present to the club for comment**
- **Gain consensus and go to work**
- **Have your Action Planner set and monitor your goals in Club Central**
- **Revise at least annually or as needed.**

Priority 1 - Increase our Impact

- Where can we make the greatest impact on our community?
- What service projects best meet community needs?
- Can we measure results?
- Will the service project resonate with the community?
- Can we tie our major fund-raiser to any of these service projects?
- OPM – what is that?
- **Rotary Suggested Goal(s)– Polio Plus, Annual Fund, Major Gifts**

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Priority 2 – Expand Our Reach

- Reach out to new groups and all the non-profits in your community. Invite them to make a presentation and tell them about Rotary.

- Use Rotary's resources to attract new members.
- Consider forming Interact, Rotaract or service clubs to increase younger and community participation.
- **RI Suggested Goal – Club Membership**

Priority 3 - Enhance Participant Engagement

- Strive to make your meetings fun and informative with new and **interesting speakers**.
- Get everyone involved.
- Give new members an opportunity to tell the club about themselves.
- Use mentors to help new members.
- **Involvement and relationships are key.**
- **Goal - Service participation**

Priority 4 – Increase Our Ability to Adapt

- Try live streaming your meetings
- Use electronic media to allow speakers from distant locations.
- Periodically have the board and/or directors give an update on club programs.
- Update your community assessment periodically or as needed. The world is turning.
- Establish a continuity plan – ensure you have a rotation plan for all leadership positions. This especially true for small clubs.
- **Rotary Suggested Goal – Keep planning current**

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Club Action Plan Champion

- Participate in a learning session by Zoom or in-person about the Action Plan Initiative and how to promote its inclusion in club planning efforts.
- Present to the Club, perhaps as a program explaining how to put the Action Plan to use. Facilitate discussion amongst club members on the four strategic priorities of the Action Plan.
- Provide reports to the District Action Plan Champion with success stories and local Club efforts.
- Promote your club success stories on social media and community media outlets.
- Assist president by updating the action plan and posting and monitoring club goals in Club Central.

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Resources

- my.rotary.org/en/who-we-are/about-rotary/action-plan
- Rotary5710.org/sitepage/rotary-action-plan
- District Strategic Plan or vision and Action Plan (TBP – currently in progress)
- Community Assessment – ex. United Way
- Pamphlets
  - Strategic Planning Guide
  - Strengthening Your Membership
  - Club Health Check Survey
  - Membership Assessment Tools

District 5710 Part II

Action Plan Method

- **Initial team SWOC analysis conducted (Strengths, Weaknesses, Opportunities, Challenges).**
- **DGE feedback from Presidents-Elect and District Planning Team.**
  - **Key focus areas: Membership, Public Image, Leadership.**
- **Aligned actions with Rotary International's four priorities.**
- **Established an initial set of metrics for progress measurement.**
- **Presented at PETS and then staffed with clubs.**

Priority 1 – *Expand Our* REACH

President Elect Insights	How Our District Can Help Our Clubs
1. Attracting New Members	1. Broaden Participant Models & Club Offerings
	2. Create Space for. Innovation & Flexibility

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Priority 2 – *Enhance Member* ENGAGEMENT

President Elect Insights	How Our District Can Help Our Clubs
1. Enhancing Engagement & Retention	Enhance Participant Engagement
2. Professional & Leadership Development	Build Leadership Through Workshops & Mentorships
3. How to Increase Member Participation	Strengthen Global Ties & Educational Outreach
4. Sustaining Growth & Impact	Engage new and younger members

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Priority 3 – *Increase Our* IMPACT

President Elect <u>Insights</u>	How Our District Can <u>Help Our Clubs</u>
1. Strengthening Social Media & Visibility	1. Enhance Digital & Social Media Presence
2. Marketing Impact through Service Projects	2. Foster Strategic Partnerships & Alliances
3. District Support for Clubs	3. Optimize Resource Allocation & Impact Measurement
4. Communicating Rotary's Impact	4. Ensure members understand how funds are spent

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Priority 4 – *Increase Our Ability to* ADAPT

President Elect Insights	How Our District Can Help Our Clubs
1. Refreshing Leadership & Club Structure	1. Embrace Technology & Innovation
	2. Improve Governance & Consistency

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Planning Team Milestones

- **Presentation distributed post-PETS for feedback.**
- **Feedback due March 24; revisions finalized early April.**
- **Detailed action plans prepared in April-May.**
- **District budget finalized in April; approved in May.**
- **NLT June 30 – District action plan approved for new Rotary year**

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Rotary Club Excellence Award

- **Go to Rotary Club Central.**
- **Review the available goals (22).**
- **Select and set at least half of the goals available.**
- **Achieve your goals.**
- **Report your achievement in Rotary Club Central by 30 June. (Note: Some achievements are recorded automatically, such as membership growth and Rotary Foundation contributions).**
- **Pay each club invoice upon receipt (no later than within 60 days).**