

**Strategic Planning 2019-22**  
**District Leadership Workshop**  
March 30, 2019



**Present:**

Peter Bosch, Craig Burnett, Julie Craig, Sue Hebner, John Hein, John Henderson, Tamie Koop, Alicia Nickols, Michael Phillips, Angela Rester, Steen Sanderhoff, Natraj Shanker, Lisa Werner, Catherine Zimmerman, Jeff Reed (Facilitator)

**Introduction:**

Members of the District Leadership Team assembled on March 30 to consider and brainstorm ideas for the future of our Rotary District and its ability to support clubs in the District. The purpose of the meeting was to provide input for strategic planning. We began with a review of the new Vision statement for Rotary International and The Rotary Foundation (RI/TRF):

**Vision: *Together, we see a world where people unite and take action to create lasting change - across the globe, in our communities, and in ourselves.***

This was followed by a review of each of the four Strategic Priorities identified by RI/TRF. (They are embedded below.) Participants formed three brainstorming groups. Each group considered each of the four priorities, brainstorming ideas for the district. Ideas were reviewed. Each participant then identified what they felt were the three most important ideas for the district in each of the four Strategic Priority areas.

The notes below capture the ideas identified. Similar ideas were combined. Ideas are ordered based on the number of votes of importance from participants in each priority category.

**Results:**

**RI/TRF Priority 1. Increase our impact**

Rotary strives to change the lives of others for the better. Our members invest volunteer and financial resources in a broad range of service activities, but we will do a better job of measuring the results and outcomes of our work. So that Rotary can continue to attract members, partners, and donors, we'll focus our programs and produce evidence of lasting impact.

**Objectives:**

- Eradicate polio and leverage the legacy
- Focus our programs and offerings
- Improve our ability to achieve and measure impact

**D6270 Question 1. What can the District do to help you and your club to increase the impact of Rotary in improving the lives of others?**

13	Assessment. District tools to do assessments. What are the needs – how do we measure or seek? Local and beyond. Schools, Community, Fire, Police, Young Families, Nonprofits, LGBTQI, Immigrants, Incarcerated, etc. Find assessments in Communities. Clubs need to determine true community assessment and deal with true needs.
7	Success Stories. Need to hear stories from people involved. Celebrate projects at conferences every year (opportunities to meet). Learn what's working (doing now) - be part of it.

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7	Partnership / Collaboration. Facilitate multi-club projects. Partner / work with Community Foundations. Times to lead vs. times to help. Get out of the tower – engage in community.
5	Projects. Project ideas (bank). “live” document of what projects are being done in district. Project think tank at every conference, opportunity.
4	Leadership. Strengthen the process and ties between District and club leadership
4	Impact. Measurement of impact of club activities. Clubs provide, District communicates - Have as a requirement for District Grants.
1	Club Goals. Help clubs have focused goals with measurable outcomes. Provide clubs with toolkits to develop focused goals
1	Communicate the “why”
1	District needs to determine how to make the clubs want to give us data, not have to give us data (bragging rights not work. \$ rewards.)
	Communication. Communicate ideas besides using website. Find/show examples from outside district, tell story and do process. District people presenting on areas of focus.
	Cheerleading
	Diversity. Building diversity in our communities. Use Rotary to question inferences re: others, community, etc.
	Offer evaluation earpiece to clubs to review projects, coaching
	1-minute standup each week re: “what Rotary does” – informational snippet for club meetings
	Use local students
	Have succession plan established.
	Open mic opportunities – promote and/or do
	Polio – future thinking – next steps & uses
	Leverage relationships
	Foster re-evaluate ongoing club traditions

**RI/TRF Priority 2. Expand our reach**

People are seeking ways to make a difference in the world and connect with others. How do we help them find what they're looking for in Rotary? By creating unique opportunities for more people and organizations to get involved. Clubs will always be important. But to extend our global reach, we'll expand our current structure with innovative models that welcome more participants into Rotary and give them meaningful ways to unite and take action.

Objectives

- Grow and diversify our membership and participation
- Create new channels into Rotary
- Increase Rotary's openness and appeal
- Build awareness of our impact and brand

**D6270 Question 2. What can District 6270 do to help you and your club to expand the reach of Rotary using innovative models creating opportunities for more people to become involved in making a difference?**

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11	Partnership. Partnering with other organizations on club and district level. Partner with other Districts - do at/around PETS.
6	Explore ways to be in Rotary – flexibility.
	Additional Membership categories.
5	Community Action Corps. Join in on established opportunities. Include Social Media Center / virtual Rotary club on District level.
5	Leadership. Focus on club leadership – who’s a good leader? How can you identify them? Right fit? Make it easier.
3	Encourage satellite clubs
3	Focus on AG role to help clubs.
2	“Look” at clubs look - Turn on? Turn off? Image? Improve club branding.
2	Use Social Media beyond Facebook
2	Addressing “Why” polio
1	Membership and Projects, purpose in Rotary, using skills of people.
1	Be a resource, to connect with RI resources (in all questions)
1	Venue. Encourage clubs to “do” new places for clubs – e.g., Senior living places
1	Outreach younger/schools/community
1	Viewed as exclusive and elitist and political - money needed.
	Build Interact / Rotaract.
	District lead leadership training <u>in communities</u> .
	Learning / Training. Use what RI has for member education. Coach Rotarians to get on Rotary.org account, and where / how resources.
	Membership. Continuing Membership Summit to happen. Make membership recruitment fun - “less work”. Follow-up on RI membership leads.
	Regional Rotary Marketing groups
	Public Image. Help with Public Image. Better focus Rotary (so broad – how explain). More informational / educational videos to understand Rotary – full breadth. Expose brand and messaging.
	Service. Family service opportunities. Guest service opportunities.
	Open to community.
	New Channels – what are they?
	Short-term Community Corps (project or time)
	Younger and newer should be involved
	Go where they are.
	Utilize our relationships
	Business Guide / Business Journal
	District key events be visible.

**RI/TRF Priority 3. Enhance participant engagement**

Because we recognize the challenges our clubs face in today's changing world, Rotary will support our clubs' efforts to deliver an experience that engages and retains members. When we help clubs focus on the experience and value they give their members, we give Rotarians and other participants the opportunity to serve together, connect with one another, and have a more satisfying experience with Rotary.

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Objectives

- Support clubs to better engage their members
- Develop a participant-centered approach to deliver value
- Offer new opportunities for personal and professional connection
- Provide leadership development and skills training

**D6270 Question 3. What can the District do to help you and your club to enhance Rotarian engagement, participation and retention?**

11	Leadership Development – within & outside of Rotary. Also Board Development.
7	District build PPT to tell what other clubs are doing – local ideas. (AG, other D6270 folks)
5	Professional connections / Marketplace. Global Rewards. Fellowships. District LinkedIn.
4	District Global Grant.
4	Have socials to get to know people. (participate)
3	Annual / semi-annual survey allowing clubs to adjust. Club level – bubble up to district. District template for clubs to use.
2	Joint projects – within D6270 or with clubs.
2	District network for careers / informal special interests. (mentoring)
2	District service opportunities.
2	Use analytics of RI – How well are we driving to RI & D6270 training.
1	Share successes (district conduit between clubs). Do on committee level.
1	Skills Training – webinar
	Help clubs simplify.
	Talk to clubs about what is relevant. Change committees on district level to accommodate.
	Communication to club about what’s going on globally.
	Rotary Mentor
	Proper introduction, orientation getting involved in 60 days (new members)
	Feedback & surveys on Retention
	New member orientation – by District, by AG, by Region
	Use other resources to promote leadership development, colleges, calendar, etc.
	Examine club traditions – are they helpful? Or turnoffs?
	When visiting a club, be objective and take a look at the club.
	Encourage, coach people to join or step up in roles as a leader
	District produced leadership development materials.
	District, club engagement - use different skills sets in people.
	District leadership needs time to mingle

**RI/TRF Priority 4. Increase our ability to adapt**

To achieve our vision and keep pace with changing global trends, our structure and culture must evolve. We'll ensure that our operating and governance structures are efficient, flexible, and effective in delivering services to all of our participants.

Objectives:

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- Build a culture of research, innovation, and willingness to take risks
- Streamline governance, structure, and processes
- Review governance to foster more diverse perspectives in decision-making

**D6270 Question 4. What can the District do to help you and your club to increase the ability of Rotary and clubs to Adapt, keeping pace with changing trends?**

8	Research ways outside organizations have emphasized change, flexibility and innovation.
8	Templates from clubs for clubs on membership structures, club structures, board structures.
5	Research clubs for successes and communicate.
4	Be present in community not just in Rotary.
4	Diverse folks at table doing this work.
3	Build cultures of openness.
2	How tier membership – make “affordable” – models.
2	Document club structures that are simple.
1	Overcome inertia of clubs – tradition, done this way.
1	District / Regional Summits (Non-Rotarians or Rotarians speaking to Rotarians). Approach Solutions.
1	Encourage use of satellite clubs at local businesses, and retirement community.
1	Partnering with those already doing it in community or clubs – what can we offer?
	Utilize RI research on successes and use/communicate.
	Utilize local college for market research.
	Rotary flash mobs.
	Get rid of politics
	Plug the holes – have clubs work together on solutions.
	Social network for 1-time service opportunities to introduce them to Rotary.
	Identify hurdles on different club structures and communicating why it shouldn't be a concern.
	Combination of term limits – plan leadership development. New people on the board.
	Make available unique / working models – way to think differently. Can't plan or change from what you don't know.
	Live – How can we help?
	Give examples of successes.
	Loss of past ways we did / communicated things – paper, newsletters (revisit)
	Everyone has to change!
	Help clubs do visioning / strategic planning.
	How can we make sure there is grass roots and higher level thought in planning?
	Risk taking – its okay!
	Streamline governance – district level.
	Identify personalities, profiles of leaders.

Respectfully submitted,  
*Jeffrey Reed*