

District 5520 Strategic Plan

Effective July 1, 2023 - June 30, 2026

This plan was created in its initial form at the District 5520 Long Range Planning Session, Socorro, NM, September 2019, was reviewed/revised during a virtual Long Range Planning meeting on 2/20/21, was reviewed/revised again during a virtual Long Range Planning meeting on 1/29/22, and was reviewed/revised again during several virtual Long Range Planning meetings (first one on December 3, 2022; second one on January 7, 2023).

Preamble

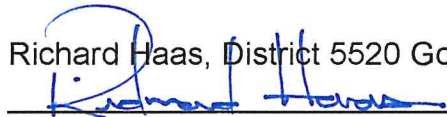
To the Clubs of District 5520:

This District 3-year Strategic Plan was developed to be implemented in conjunction with you, our Clubs (specifically Priorities 1-3). As such, we are making suggestions to you about several objectives (related to membership, the Rotary Foundation, and Public Image). These are not mandates, simply suggestions. We will be working in tandem with you regarding these objectives. You'll notice that the objectives for these priorities are listed as "objectives/aspirations" to reflect that these are not mandates.

For Priorities 4-8, which are specifically District Priorities and Objectives, you as our Clubs are our customers and, ultimately, our Bosses! As such, it is up to you to hold us accountable for these objectives, and we will be reporting regularly to you on our progress, not just with these but with the first three priorities as well.

On behalf of the entire District Leadership Team, we greatly appreciate the opportunity to work with you to strengthen our District as well as our Clubs. We believe in a culture of improvement, and we intend to attain and maintain excellence in everything we do.

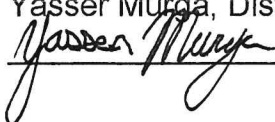
Richard Haas, District 5520 Governor Elect



Date

2.7.23

Yasser Murga, District 5520 Governor Nominee



Date

2/4/23

District/Club Priority 1: Build and grow the awareness of Rotary and expand the knowledge of Rotary's mission and activities in our District's communities to expand our reach, increase our impact, and grow our membership.

Objective/Aspiration: Increase each Club's public representation through all available media (e.g., social media posts, news articles, newsletter articles, etc.) by 25% each year (using existing data to establish our baseline).

Responsible Party: District Public Image Chair and Committee
with support from District Governor (DG) Richard, District Governor Elect (DGE) Yasser, District Governor Nominee (DGN), District Governor Nominee Designate (DGND), Assistant Governors (AG's), Lieutenant Governors (LG's), Club Presidents, Club Presidents-Elect, and Club Public Image Committees

District/Club Priority 2: Grow (Net) Membership

Objective/Aspiration: Average of 5% membership year-over-year growth by the end of the 2025-26 Rotary Year (as measured by end-of-year statistics and by using existing data to establish our baseline), with 2300 members by the end of 2025-26 Rotary Year

Responsible Party: District Membership Chair and Committee
with support from DG Richard, DGE Yasser, DGN, DGND, AG's, LG's, Club Presidents,
Club Presidents-Elect, and Club Membership Chairs

District/Club Priority 3: Increase Participation in all Rotary Foundation Programs

Objective/Aspiration #1: 25% increase in the number of Rotarians in District 5520 who support the Rotary Foundation (i.e., at least one Program) by the end of the 2025-26 Rotary Year (using existing data to establish our baseline)

Objective/Aspiration #2: 100% of Clubs participate/contribute to the Rotary Foundation by 2025-26.

Responsible Party: District Rotary Foundation Chair and Committee (including Sub-Committees)

with support from DG Richard, DGE Yasser, DGN, DGND, AG's, LG's, Club Presidents, Club Presidents-elect, and Club Rotary Foundation Committees

**District Priority 4: Foster a Culture of Accessibility, Respect and Collaboration
(e.g., across the District, District/Club, Club to Club) based on the Four-Way Test**

Objective: 80% of respondents or more "highly satisfied" with the District Culture, measured through tools including 360° Review and Club/Member Feedback by the end of the 2025-26 Rotary Year.

This would need to be demonstrated (via core values) through the various District Committees including Rotary Foundation, Membership, and Public Image.

Responsible Party: DG Richard
with support from DGE Yasser, DGN, DGND, and full District Leadership Team

District Priority 5: Create and effectively manage and make available our knowledge assets, including policies and procedures, meeting minutes, bylaws, and other key documents and information

Objective: 10% increase from baseline and/or 50% of respondents or more “highly satisfied” related to “we have what we need, we know where to find it, and we know how to access it” by the end of the 2025-26 Rotary year. (We will conduct the survey at both District and Club levels – at Club level, it would be related to District assets, not Club assets).

Responsible Parties: District Policies/Procedures Leads (PDG Sunny Kellerman and PDG Dick Jones)

with support from DG Richard, DGE Yasser, DGN, DGND, District Executive Secretary Donette Wagner, Historian Pam Lillibridge, and PDG Linda Woodward (for access to archived materials)

District Priority 6: Develop and Implement effective communication/information sharing structure and protocols

Objective #1: 80% of respondents or more "highly satisfied" with District communication/information sharing by the end of the 2025-26 Rotary Year.

Objective #2: Increase by 20% the # of Rotarians year over year (using existing data to establish our baseline) who open e-mail, respond to district requests, open newsletters, etc.

Objective #3: Increase by 20% the # of Rotarians year over year (using existing data to establish our baseline) who have a complete District profile in ClubRunner

Objective #4: Ensure effectiveness of AG's as "concierges" to their Clubs (as measured by District Governor)

Responsible Party: District Trainer (PDG Sunny Kellerman)
with support from DG Richard, DGE Yasser, DGN, DGND, AG Representative Jen Dresser, DGE Yasser, Executive Secretary Donette Wagner, District Newsletter Chair, and District PI chair Eric Collings

District Priority 7: Cultivate and Motivate Leaders

Objective: Each year, all District Leadership posts are filled including full and functioning District Committees (e.g., Committee members would be in line to become committee chairs as part of succession planning), and each Committee has a succession plan developed and in place. Leadership positions are filled with a focus on people who will promote, reinforce, and embrace our District and RI plan, vision, values, priorities.

Responsible Party: Governor Line (DG Richard, DGE Yasser, DGN, DGND and immediate Past District Governor John)
with support from Rotary Leadership Institute Chair, AG's, and LG's

District Priority 8: Attain/Maintain Excellence with District-Specific Programs

Objective: Support the Clubs by ensuring that all District-wide programs are implemented with excellence (as defined for each Committee/function and by ensuring that all Committees have measurable goals for excellence each year) including having the resources (e.g., financial, public image/awareness, people) they need to empower Clubs and produce desired results/outcomes in alignment with RI and other District priorities.

Responsible Party: Governor Line
with support from Committee/Programs Chairs and LG's