

Rotary District 5520 Strategic Plan

Effective July 1, 2025 - June 30, 2028

This plan was created in its initial form at the District 5520 Long Range Planning Session, Socorro, NM, September 2019, and has been reviewed/revised each Rotary year since then with the support of the District Strategic Planning and Innovation Cadre.

Preamble

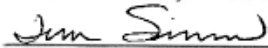
To the Clubs of District 5520:

This District 3-year Strategic Plan was developed to be implemented in conjunction with you, our Clubs, and in alignment with our District Three-Year Rolling Goals Plan. For a number of the Priorities, which have both a Club and District role to accomplish their goals, we allude to several Club-level 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 5-9, 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.

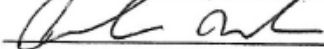
Tom Simon, District 5520 Governor



Date

8/8/2025

Jeff Weinrach, District 5520 Governor Elect



Date

8/5/25

Laura Gonzales, District 5520 Governor Nominee



Date

8/7/2025

Rotary District 5520 Purpose Statement

Key Message and Goal:

Rotary District 5520 aligns with the Big West Zone goal to grow Rotary, engagement and Rotary Foundation support, and to plan with collaboration and thoughtful intention. We are committed to supporting our Clubs in setting and achieving goals that reflect their individual needs and contexts, emphasizing flexibility, innovation and equity across our diverse membership.

Statement of Purpose:

Rotary District 5520 empowers Rotary Clubs within our District to turn the Rotary International 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."*) into reality by providing the support, resources, and learning opportunities necessary for Clubs to thrive, grow, and make a significant impact for good in their communities and around the globe.

Note about Six Rotary International High-Priority Goals

Rotary International, through its three-year goal initiative, has identified six key goals for all Clubs to address. Those goals are documented within our strategic plan as part of our "Success Measures" sections with a * at the beginning of the statement.

Consider budget and other resources associated with our goals. Also consider tools (could be in the action plans)

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

Support every Rotary club in confidently and consistently sharing their impact with the public — using tools, storytelling, and platforms that align with Rotary's brand and mission.

Rather than focusing solely on content quantity or percentage growth, this strategy empowers clubs with skills, templates, and recognition. Progress will be measured by visibility, participation, and consistency across platforms.

Success Measures

At the Club level:

- Every club maintains a minimum digital presence:
 - A functional, up-to-date website
 - One active public-facing social media platform of their choice (e.g., Facebook, Instagram, LinkedIn, YouTube)
- Percentage of clubs that have a public image chair, club storyteller and/or designated photographer.
- Percentage of clubs that complete at least one Quarterly Public Image Challenge each year
- Percentage of clubs that submit at least one story or press release to the district annually
- Percentage of clubs that include a public image line item in their club budget
- Percentage of clubs that are proactively tracking the effectiveness of their public image activities.

At the District level:

- Increased engagement with district media channels (Facebook, Instagram, LinkedIn, newsletter)
- Increased story submissions and event promotions from clubs
- Well publicized link on District website to Zone Public Image Resources
- Encourage clubs to submit events in advance to the Yucca so that other clubs can help/participate
- Establishment of a District Story Squad to help document and share service from under-resourced or smaller clubs
- Growth in brand-aligned storytelling across external-facing media, including:
 - A district LinkedIn page dedicated to Rotary success stories
 - An active news bureau function that distributes selected stories to local press outlets and community blogs
 - A shared repository of district-approved press releases and success stories

Responsible Parties

- **District Public Image Committee**
In collaboration with:
 - District Membership Committee
 - District Rotary Foundation Committee
 - District Service Projects Committee
- **District Leadership:**
District Governor (DG) Tom, District Governor Elect (DGE) Jeff, District Governor Nominee (DGN) Laura, District Governor Nominee Designate (DGND), Assistant Governors (AGs), Lieutenant Governors (LGs)
- **Club Leadership:**
Club Presidents, Presidents-Elect, and Club Public Image Committees or Story Teams

District/Club Priority 2: Grow (Net) Membership

Objective/Aspiration: Achieve an average of 3% net growth in membership year-over-year. (as measured by end-of-year statistics and by using existing data to establish our baseline).

Objective/Aspiration: Establish at least 2 new Club Satellites and at least 1 new Rotary Club in the District as a significant part of the membership growth goal.

Success Measures:

- *For each Club in our District, Number of active members at the end of each Rotary year through the 2027-28 Rotary year
- For each Club in our District, number of active members recruited and number of active members retained at the end of each Rotary year through the 2027-28 Rotary year
- At Club and District levels (aggregated from Club results), active member engagement survey results
- Results of Rotary International DataBase showing current number of active Clubs and Satellites showing increase over the previous year.

Responsible Parties:

- District Membership Chair with support from established District Membership Committee and collaboration from our District Committees including the District Rotary Foundation Committee, the District Public Image Committee, and the District Service Projects Committee.
- District Governor (DG) Tom, District Governor Elect (DGE) Jeff, District Governor Nominee (DGN) Laura, District Governor Nominee Designate (DGND), Assistant Governors (AG's), Lieutenant Governors (LG's)
- Club Presidents, Club Presidents-Elect, and Club Membership Committees

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

Objective/Aspiration #2: Increase by 5% the number of Clubs -contributing to the Rotary Foundation by the end of the 2027-28 Rotary year. (Detail the reports used to establish baseline)

Objective/Aspiration #3: Promote to our Clubs the availability of The Rotary Foundation as a funding source for their Club and Community projects.

Objective/Aspiration #4: Increase the District's overall understanding of The Rotary Foundation so that we can better understand it's programs and better utilize the funding available to the benefit of our Clubs and Communities.

Objective/Aspiration #5: Establish and build upon the many ways Individuals and Clubs can participate in Rotary Foundation program or events – (i.e., host a Foundation Program at a Club meeting, host an event in support of Polio Plus, schedule a Foundation Fund Raiser or Training, attend a District sponsored Foundation event (such as the International Project Fair or a District Foundation Assembly).ram, tie counting to The Yucca (?),

*More Rotarians will be willing to give to the Foundation.
when they feel more involved with the Foundation!*

Success Measures:

- *For each Club in our District, amount of money donated to the Rotary Foundation Annual Fund
- *For each Club in our District, amount of money donated to PolioPlus fund
- *For each Club in our District, number of individuals or couples that will inform the Rotary Foundation that their estate plans, including the Endowment Fund as a beneficiary, or will make any outright gift of \$1000 or more to the Endowment Fund.
- At Club and District levels (aggregated from Club results), number of Clubs that support the Rotary Foundation each Rotary year.
- At Club and District levels (aggregated from Club results), number of Rotarians that support the Rotary Foundation, and percent of all Rotarians in District 5520 that support the Rotary Foundation.

Responsible Parties:

- District Rotary Foundation Chair and Committee with support and collaboration from our District Committees including the District Membership Committee, the District Public Image Committee, and the District Service Projects Committee.
- District Governor (DG) Tom, District Governor Elect (DGE) Jeff, District Governor Nominee (DGN) Laura, District Governor Nominee Designate (DGND), Assistant Governors (AG's), Lieutenant Governors (LG's)
- Club Presidents, Club Presidents-Elect, and Club Rotary Foundation Committees

District/Club Priority 4: Increase Participation in all Rotary Club and District Service Projects

Objective/Aspiration #1: Increase by 25% the number of Rotarians in District 5520 who participate in Club and/or District service projects by the end of the 2027-28 Rotary Year (using existing data to establish our baseline)

Objective/Aspiration #2: 100% of Clubs participate in service projects (e.g., the Club's own projects, another Club's projects, the District's projects) how do we measure member participation at the club level. Each project has different club member participation. Are we looking member participation in at least one project during the year?

Success Measures:

- *For each Club in our District, number of members who participate in service projects
- At Club and District levels (aggregated from Club results), number of Clubs that develop and implement service projects (i.e., their own projects)

Responsible Parties:

- District Service Projects Committee Chair and Committee with support and collaboration from our District Committees including the District Membership Committee, the District Public Image Committee, and the District Rotary Foundation Committee.
- District Governor (DG) Tom, District Governor Elect (DGE) Jeff, District Governor Nominee (DGN) Laura, District Governor Nominee Designate (DGND), Assistant Governors (AG's), Lieutenant Governors (LG's)
- Club Presidents, Club Presidents-Elect, and Club Service Project Committees

**District Priority 5: 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 are "highly satisfied" with the District Culture, measured through tools including 360° Review and Club/Member Feedback by the end of the 2027-28 Rotary Year.

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

Responsible Parties:

- District Club Engagement Committee (coordination/support role)
- All District Committees
- District Governor (DG) Tom, District Governor Elect (DGE) Jeff, District Governor Nominee (DGN) Laura, District Governor Nominee Designate (DGND), Assistant Governors (AG's), Lieutenant Governors (LG's)

District Priority 6: 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 2027-28 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).

Success Measures:

- Club/Member satisfaction related specifically to District documentation

Responsible Parties:

- District Policies/Procedures Committee co-Chairs (PDG Sunny Kellerman and PDG Dick Jones)
- District Governor (DG) Tom, District Governor Elect (DGE) Jeff, District Governor Nominee (DGN) Laura, District Governor Nominee Designate (DGND), Assistant Governors (AG's), Lieutenant Governors (LG's)
- District Executive Secretary Donette Wagner, Historian Pam Lillibridge, and PDG Linda Woodward (for access to archived materials)

District Priority 7: 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 2027-28 Rotary Year.

Objective #2: Improve effectiveness of AG's as "concierges" to their Clubs (as measured by Clubs and District Governor)

Success Measures:

- Number of Rotarians year over year (using existing data to establish our baseline) who open e-mail, respond to district requests, open newsletters, etc.
- Number of Rotarians year over year (using existing data to establish our baseline) who have a complete District profile in ClubRunner

Responsible Parties:

- District Learning Facilitator Jen Dresser
- District Governor (DG) Tom, District Governor Elect (DGE) Jeff, District Governor Nominee (DGN) Laura, District Governor Nominee Designate (DGND), Assistant Governors (AG's), Lieutenant Governors (LG's)
- District Executive Secretary Donette Wager, District Public Image Committee (including District Newsletter publisher)

District Priority 8: 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.

Success Measures:

- Number of District Committees that have developed a succession plan
- Number of new leaders who have been identified by the District and who serve in a Club or District leadership role

Responsible Parties:

- District Governor (DG) Tom, District Governor Elect (DGE) Jeff, District Governor Nominee (DGN) Laura, District Governor Nominee Designate (DGND), Immediate Past District Governor Yasser, Assistant Governors (AG's), Lieutenant Governors (LG's)
- District Rotary Leadership Institute Chair Carla Spaniel and District Learning Coordinator Jen Dresser

District Priority 9: Attain/Maintain Excellence at all levels and for all roles within our District

Objective #1: Support the Clubs by ensuring that all aspects of our District are implemented with excellence (as defined for each District Leadership Team member and for each Committee/function and by ensuring that all District Leadership Team member and each Committee has 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.

Objective #2: Support the Clubs by ensuring that all Clubs have a strategic plan in place aligned with Rotary International priorities.

Success Measures:

- *All Clubs within our District has an up-to-date strategic plan in place.
- High favorability from our Clubs on the effectiveness of the District

Responsible Parties:

- District Performance Excellence Committee (coordination/support role)
- District Governor (DG) Tom, District Governor Elect (DGE) Jeff, District Governor Nominee (DGN) Laura, District Governor Nominee Designate (DGND), Assistant Governors (AG's), Lieutenant Governors (LG's)
- All District Committee Chairs