Rotary

District 5520

District 5520 Strategic Plan

Effective July 1, 2020 - June 30, 2023

[This plan was created in its initial form at the District 5520 Long Range Planning Session, Socorro, NM, September 2019]

District Objective 1: Cultivate a Culture of Kindness and Respect based on the Four-Way Test

Goal: 80% or more "highly satisfied" with the District Culture, measured through tools including 360^0 Review and Club/Member Feedback by the end of the 2022-23 Rotary Year.

Additional Indicator: Increase involvement in District Activities to demonstrate an improved culture

Strategies/Initiatives over three-year period:

(a) Training Team will reinforce this at Assistant Governor/Lieutenant Governor (AG/LG) Training and the Presidents-Elect Training Seminar (PETS).

(b) Ensure that we act promptly on club/member feedback as a sign of respect. We also want to acknowledge the feedback that we receive and demonstrate to the clubs/members and those that provided the feedback that we act on it.

(c) Use peer review to assess ourselves at the District leadership level.

(d) Think before speaking and eliminate gossip.

Rotary

District 5520

District Objective 2: Create and effectively manage our knowledge assets, including policies and procedures, meeting minutes, bylaws, and other key documents and information

 Goal: 80% 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 2022-23 Rotary year. (Conduct the survey at both District and Club levels (at Club level, it would be related to District assets, not Club assets).

 Strategies/Initiatives over three-year period:

(a) Include the relevant procedures that need to be followed.

(b) Develop a master list of key District documents.

(c) Use ClubRunner for relatively small documents and the Cloud for larger documents.

(d) Make sure to address information security and access (i.e., who should have access to what, and is it read-only or edit access).

(e) Focus on streamlining (i.e., limit document clutter).

(f) Foster a regular practice of adding documents to our repository.

(g) Develop a meeting minutes template that would be used for all District meetings.

(h) Use ClubRunner to manage most Committee documents such as meeting minutes. This would be in conjunction with Committee members having full access to these documents but not all Rotarians.

(i) Develop and execute a long-term plan for transition from the Las Cruces Document Storage to the electronic storage mentioned in (b) and (c) above.

(j) Ensure "sustainability" of District documents (e.g., make sure that the documents stored electronically will be accessible regardless of new versions of Windows, compatibility with new software).

District Objective 3: Develop and Implement effective communication/information sharing structure and protocols

Goal: 80% or more "highly satisfied" with District communication/information sharing by the end of the 2022-23 Rotary Year.

Additional Indicator: # of Rotarians or % of Club members (TBD) who open e-mail, view newsletters, etc., and

Strategies/Initiatives to consider within three-year period:

(a) Establish a baseline; Identify what we can track and how to track it
(b) Develop a system to prioritize who gets (or should get) message, who should send the message (i.e., role of Executive Secretary), and modes of communication (i.e., how it is sent and received)
(c) Develop and disseminate weekly one-pager to all members like the "Kiplinger Letter" with hyperlinks to access additional information
(d) Produce DG videos to be shown at club meetings (one or two minute variety)
(e) Have AG's identify Club members interested in particular topics (to target particular communications)
(f) Ensure that we have feedback loops for our communications (e.g., members communicating to District Leadership)
(g) Focus on technology/Zoom when applicable
(h) Acknowledge/appreciate Clubs/Members other than through Facebook and our newsletter
(i) Communicate all relevant policies and procedures
(j) Consider snail mail/personalized communications (link to #7)
(k) Communicate purpose/agenda for all Committee meetings (perhaps template similar to notion for meeting minutes template in 2.7)

Rotary

District 5520

District/Club Objective 4: Employ all methods of branding to build awareness of our Impact and brand within our Clubs and our communities (i.e., Improve & Grow Rotary Image)

Goal: All Clubs will have qualified under the Public Image section of the Rotary Citation by the end of the 2022-23 Rotary Year.

Strategies/Initiatives over a three-year period:

(a) Ensure that we are communicating a consistent message.

(b) Use new Rotary branding (i.e., the "Masterbrand" above).

(c) Educate and inform clubs about Rotary Brand Central and other branding resources and provide support, where appropriate.

(d) Effectively utilize all available media (e.g., print media, PSA's, billboards).

(e) Ensure all clubs have a functioning Public Image Committee.

(f) Encourage and support clubs' promoting their events.

(g) Ensure that the District has a full District Public Image Committee and appropriate budget.

(h) Utilize an exit process for departing Rotarians to discover gaps between expectations and experiences, with a view to improving our internal brand (i.e., Rotarians' experience of Rotary).

District/Club Objective 5: Grow (Net) Membership

Goals: 2500 Members in District 5520 by the end of the 2022-23 Rotary Year

Rotary

District 5520

By the end of the 2020-21 Rotary Year, our membership will be at 2312 or more. By the end of the 2021-22 Rotary Year, our membership will be at 2362 or more.

Strategies/Initiatives over a three-year period:

(a) Develop and execute our District Membership Plans for Recruitment, Retention, and Club Extension (click here for the Club Membership Plan and here for the New Club Development Plan).

(b) Identify and marshal key resources to execute the plan (e.g., funding, people).

(c) Grow Rotaract Clubs/membership (in conjunction with the District Youth Programs Committee).

District/Club Objective 6: Increase Participation in all Rotary Foundation Programs

Goal: 100% of Rotarians in District 5520 support the Rotary Foundation (at least one Program) by the end of the 2022-23 Rotary Year

Strategies/Initiatives over a three-year period:

a) Establish methods for identifying and tracking types of Rotarian support.

b) Build awareness/increase education regarding the Foundation and its various programs.

c) Focus on club/member recognition.

Rotary

District 5520

d) Develop a plan to hold a Million-Dollar Dinner within three years.

e) Establish a "Triple-Crown" Circle (Paul Harris Society, Bequest Society, Major Donor) and promote participation in it.

f) Support World Polio Day and other Rotary Foundation initiatives.

District/Club Objective 7: Cultivate and Motivate Leaders

Goal: 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.

Strategies/Initiatives to consider within three-year period:

(a) Provide opportunities for leadership development.

(b) Collaborate with Toastmasters (led by Rotary International).

(c) Develop and use job descriptions for District Leaders which include qualification requirements to fulfill District roles/responsibilities.

(d) Identify and utilize potential leaders in our clubs (and have Assistant Governors participate in this process).

(e) Revitalize the Rotary Leadership Institute.

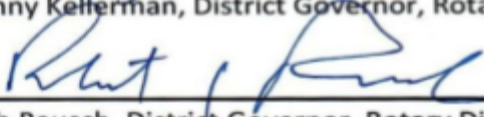(f) Make sure we have sufficient turnover at the District leadership level to bring in new and

Rotary
District 5520

young leaders who offer new and fresh ideas.

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Sunny Kellerman, District Governor, Rotary District 5520, 2020-2021

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Bob Rausch, District Governor, Rotary District 5520, 2021-2022

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John Drusedum, District Governor, Rotary District 5520, 2022-2023