

District 5520 Strategic Plan
Effective July 1, 2021 - June 30, 2024

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, and reviewed/revised again during a virtual Long Range Planning meeting on 1/29/22

District Priority 1: Continue a Culture of Accessibility and Respect based on the Four-Way Test

Objective: 80% (1600+ of 2000 members) or more "highly satisfied" with the District Culture, measured through tools including 360⁰ Review and Club/Member Feedback by the end of the 2022-23 Rotary Year.

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) Increase involvement (Club and District Leadership Team) in District Activities to demonstrate an improved Culture.
- (d) Use peer review to assess ourselves at the district leadership level.
- (e) Use technology to make meetings and communications more effective and deliver a good virtual experience. Develop a team of tech experts to train clubs in using technology and to serve as a resource to them.

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

Objective: 80% (1600+ of 2000 members) 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) Develop a streamlined master list of key District documents and ensure that the appropriate people have access to shared files. (Coordinate the use of the District DropBox). Ensure "sustainability" of District documents: Establish protocols in the District's Policies and Procedures Manual to ensure that all electronic documents will be stored in one place, accessible to District leadership, and that documents are regularly reviewed to confirm that they are available in currently accessible formats.
- (b) Ensure backup for document management for continuity purposes
- (c) Use ClubRunner for relatively small documents and the Cloud (District DropBox) for larger documents.
- (d) Foster a regular practice of adding documents to our repository. (Ongoing)
- (e) Develop and disseminate a meeting minutes template that would be used for all District meetings.
- (f) Use effective access controls in ClubRunner to ensure that committee members have access to documents while limiting unauthorized access.
- (g) Develop and execute a long-term plan for transition from the Las Cruces Document Storage (New Mexico State University Rotary archives) to the electronic storage mentioned in (b) and (c) above. Enroll and train a new District Historian and establish a committee to manage our District's historical documents and artifacts.

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

Objective #1: 80% (1600+) or more "highly satisfied" with District communication/information sharing by the end of the 2022-23 Rotary Year.

Objective #2: Increase by 20% the # of Rotarians year over year who open e-mail, respond to district requests, open newsletters, etc.

Objective #3: Increase by 20% the # of Rotarians who have a complete District profile in ClubRunner

Strategies/Initiatives to consider within three-year period:

- (a) Complete establishment of 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). Make email etiquette guidelines available to all (should be in policies/procedures manual).
- (c) Produce timely brief DG videos as well as recommend pertinent RI videos to be shown at club meetings.
- (d) Educate Assistant Governors to effectively and proactively communicate with club officers and club members regularly. Have AG's identify Club members interested in particular topics (to target particular communications)
- (e) Ensure that we have feedback loops for our communications (e.g., members communicating to District Leadership)
- (f) Acknowledge/appreciate Clubs/Members other than through Facebook and our newsletter
- (g) Communicate all relevant policies and procedures (that will be in the District manual)
- (h) Use all available communication methods to reach all Rotarians. Use methods preferred by individual recipients, when possible, and use personal communications when practicable.
- (i) Communicate purpose/agenda for all Committee meetings (perhaps template similar to notion for meeting minutes template in Strategy/Initiative 2.e)
- (j) Reinforce importance of Clubs to maintain accurate member, especially officer, information including in ClubRunner.
- (k) Effectively share information about Club-level service projects to promote opportunities for collaboration, including through the District Service Projects Committee.

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

Objective: 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 the entire District is communicating a consistent brand (consistent with RI standards).
- (b) Educate clubs about Rotary Brand Central and other branding resources, and provide support, where appropriate.
- (c) Encourage clubs (through trainings and resources) to have current web and Facebook sites by 1/1/2023.
- (d) Effectively utilize all available media (e.g., print media, PSA's, billboards).
- (e) Encourage all clubs have a functioning Public Image Committee, and ensure that all Clubs have a Public Image Chair.
- (f) Encourage and support clubs to promote their events both before and after the fact.
- (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 improve our internal brand (i.e., Rotarians' experience of Rotary).

District/Club Priority 5: Grow (Net) Membership

Objective: 5% (100) membership year-over-year growth by the end of the 2045-25 Rotary Year (as measured by end-of-year statistics)

Strategies/Initiatives over a three-year period:

- (a) Develop and execute our District Membership Plans for Recruitment, Retention (primary focus), 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 to at least four in our District and support Rotaractors in transitioning to Rotary Clubs, when appropriate
- (d) Implement our “Each One Bring One” campaign in 2022-2023, and “Each One Keep One” campaign in 2023-2024
- (e) Foster the formation of new, including non-traditional, Rotary clubs in our District and have a total of at least 4 new clubs by 6/30/23.
- (f) Support RI’s “Diversity, Equity and Inclusion” initiative: Encourage clubs to ensure that their membership reflects their communities and to further ensure that their governance and communication cultures are inclusive.
- (g) Utilize an exit process for departing Rotarians to discover gaps between expectations and experiences, with a view to improve our internal brand (i.e., Rotarians' experience of Rotary). (aligned with Strategy/Initiative 4.h)
- (h) Maintain fully staffed and trained District’s Membership Committee.

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

Objective: 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) Maintain fully staffed and trained District's Rotary Foundation Committee.
- (b) Use RI data for identifying and tracking types of Rotarian support.
- (c) Build awareness/increase education regarding the Foundation and its various programs, including promoting at least one Club program per year on TRF and its programs.
- (d) Educate and train Rotarians in our new District Endowment Initiative -- and build a marketing plan.
- (e) Increase club collaboration with other clubs and other organizations, in their communities and in their regions, through engagement in "Rotary Days of Service." (e.g., through district grants).
- (f) Focus on club/member recognition, through personal communications, when appropriate, and at our District Conference.
- (g) Promote our District's "Triple-Crown" Circle (Paul Harris Society, Bequest Society, Major Donor) and expand the number of members in it.
- (h) Support multiple events in observation of World Polio Day.

District/Club Priority 7: Cultivate and Motivate Leaders

Objective: 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 (through the District Policies and Procedures Manual).

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) On an ongoing basis and with the support of Assistant Governors, create, store and manage a list of emerging and potential leaders and their possible roles, share the opportunities and expectations of District leadership with new members and at PETS, and foster succession planning for all District leader positions
- (e) Continue to promote the Rotary Leadership Institute (RLI), and incentivize/recognize Rotarians who complete RLI.
- (f) Empower Rotaract leadership by including Rotaract clubs in Clubrunner, placing Rotaractors on District Committees, and including Rotaractors in all aspects of our District plan and District Trainings. (e.g., invite our DRR and Rotaract Presidents Elect to PETS)
- (g) Make sure we have sufficient turnover at the District leadership level to bring in new and young leaders who offer new and fresh ideas.



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