



# Rotary District 6420 Strategic Plan 12-Month Update for Rotary Year 2024-2025

Fellow Rotarians,

This is the 2024-2025 version of District 6420's Strategic Plan. The group of Rotarians who met in person and reviewed the plan embraced our Vision Statement without change. Personally, I think that statement is excellent and embraces who we are and what we are about in a few very well-chosen words.

If you have not studied our Strategic Plan previously, note that the organization of the document has five important priorities (Membership, the Rotary Foundation, Public Image, Service, and Operations), each with a set of relevant, reasonable, and achievable goals. Those goals are driven by specific action plans that reflect the District's needs and challenges and provide a call to action for clubs and Rotarians.

If you are familiar with our Strategic Plan, you will note that there are significant and exciting additions: a three-year thank you for Foundation donors, a district-level advocate for DEIB projects, a strategic review of any surplus funds that may be available, and a requirement for Presidents-Elect to receive training on risk management. A close look will reveal other updates as well.

Our Strategic Plan is useful and effective because it is annually reviewed, adjusted as deemed appropriate, and reissued to our members. Let us make it a collective District 6420 priority to know the contents of our Strategic Plan and make the goals and actions plans relevant parts of our club and District operations.

Thanks to all the Rotarians who worked to develop the document initially and to those who have given of their time and energy to annually review and update it.

Yours in Rotary,

A handwritten signature in black ink that reads "John Hurley".

John Hurley  
Governor, 2024-2025  
District 6420

## District Vision

An active and diverse Rotary District working collaboratively to enrich our member's Rotary experience and make a lasting impact among those we serve locally and globally.

### Strategic Priority #1 – Membership

#### Increase the number of active, engaged, and diverse members and clubs.

##### 12-Month Goals

- 1.1 Increase the number of members by a net of 5.
- 1.2 Increase the number of Rotary clubs from 42 to 43.
- 1.3 Increase the number of active Rotaract clubs by 1.
- 1.4 Increase the percentage of female members by 10% (from 40% to 44%).

##### Action Plan

- Maintain the District-level Membership Committee and actively seek new members.
- Encourage clubs to appoint a Membership Chair and Membership Committee that can work directly with the District Membership Committee.
- Encourage clubs to complete the Rotary Club Health Check and participate in Club Vitality Workshops.
- Encourage clubs to offer professional development opportunities (e.g., leadership positions) to new and younger members.
- Encourage clubs to develop a membership that reflects their community's demographics.
- Implement a new District-wide membership drive.
- Provide to club-level Membership Chairs and Membership Committees membership development trainings that include a focus on membership retention.
- Encourage club Membership Chairs and Membership Committees to complete relevant courses in Rotary's Online Learning Center.
- Encourage clubs to add a family membership option.
- Have the District Chairs for membership, the Rotary Foundation, public image, and service meet quarterly to foster greater collaborations across each area.

## Strategic Priority #2 – Rotary Foundation

### Increase contributions to the Rotary Foundation and involvement in Rotary Foundation programs.

#### 12-Month Goals

- 2.1 Increase the amount of giving to the Rotary Foundation's Annual Fund by 10% (from \$200,027 to \$220,030).
- 2.2 Increase the amount of giving to the Rotary Foundation's PolioPlus fund by 5% (from \$73,659 to \$77,341)
- 2.3 Increase the number of members contributing to the Rotary Foundation by 10% (from 735 to 808)
- 2.4 Increase involvement in Rotary Foundation programs.
- 2.5 Increase the number of Every Rotarian Every Year (EREY) clubs by 2.

#### Action Plan

- Encourage clubs to appoint a Foundation Chair and Foundation Committee that can work directly with the District Foundation Committee.
- Provide easy and multiple opportunities (e.g., Rotary Direct) for members to contribute to the Rotary Foundation.
- During new member orientation, encourage clubs to include information about the Rotary Foundation, its impact, and the expectation that all Rotarians should contribute annually.
- Showcase Rotary Foundation programs and projects at club and District events.
- Identify at least one qualified person interested in becoming a Rotary Foundation Global Scholar or Peace Scholar.
- Have the PolioPlus Committee work with clubs to promote awareness and increase giving to the PolioPlus fund.
- Promote the 3-year thank you to recognize those who contributed to the Annual Fund three years ago and consequently impacted the amount of DDF available during this Rotary year.
- Launch a Legacy Campaign to further increase giving District-wide.
- Promote an increase in the number of Bequest Society and Benefactors in the District.
- Have the District Chairs for membership, the Rotary Foundation, public image, and service meet quarterly to foster greater collaborations across each area.

## Strategic Priority #3 – Public Image

**Improve how we promote Rotary and our positive impact locally and globally.**

### 12-Month Goals

- 3.1 Increase member support for the District newsletter (*the Actuator*), by increasing its open rate by 10% (from 44% to 48%)
- 3.2 Increase the number of members participating in public image training events by 20% (from 16 to 19).
- 3.3 Provide clubs with direct assistance to improve their social media and website.
- 3.4 Strive to become 100% compliant with Rotary branding requirements.
- 3.5 Increase the percentage of clubs posting events on the District's ClubRunner calendar to 40%.
- 3.6 Increase the number of District Facebook followers by 5% (from 694 to 729).

### Action Plan

- Encourage clubs to appoint a Public Image Chair and Public Image Committee that can work directly with the District Public Image Committee.
- Promote the District's Public Image Award program.
- Engage the Assistant Governors to assist with accomplishing Public Image goals by providing them with quarterly club visit topics and content.
- Encourage clubs to improve their District newsletter (*the Actuator*) open rate.
- Encourage clubs to enter their events on the District's ClubRunner calendar.
- Help three clubs without a website to establish one.
- Provide at least two trainings for clubs to highlight the importance of Rotary brand fidelity and state-of-the-art public image strategies, including internal club communication strategies.
- Have the District Chairs for membership, the Rotary Foundation, public image, and service meet quarterly to foster greater collaborations across each area.

## Strategic Priority #4 – Service

**Foster active and involved clubs committed to service.**

### 12-Month Goals

- 4.1 Encourage participation in the annual District-wide service project.
- 4.2 Promote club service projects that champion greater Diversity, Equity, Inclusion, and Belonging (DEIB).
- 4.3 Implement a strategy to recognize and reward community-focused club service project successes.
- 4.4 Increase the number of collaborative service projects or areawide programs when geographically possible.

### Action Plan

- Encourage clubs to appoint a Service Project Chair and Service Project Committee that can work directly with the District Service Project Committee.
- Appoint a District DEIB advocate to work closely with the District Service Project Chair.
- Showcase club service projects at club and District events and publish a list of club service projects on the District website to encourage clubs to try something new.
- Encourage clubs to partner with other Rotary, Rotaract, Interact, and EarlyAct clubs and community organizations, including organizations that focus on underserved members of the community, to conduct bigger and more impactful service projects.
- Launch and promote a Service Project Award program that includes recognition of projects that champion DEIB.
- Introduce the District-wide service project at PELS to allow club's ample time for planning.
- Have the District Chairs for membership, the Rotary Foundation, public image, and service meet quarterly to foster greater collaborations across each area.

## Strategic Priority #5 – Operations

### Make more effective use of District resources for the benefit of clubs and Rotarians.

#### 12-Month Goals

- 5.1 Mitigate District dues increases by using available District surplus funds to help keep District dues as low as possible.
- 5.2 Ask the District Finance Committee, with support from the District Governor line, to implement a strategic approach for allocating surplus District funds and determining a minimum amount necessary to fund the District each year.
- 5.3 Develop a written succession plan for District leadership and District committees.
- 5.4 Continue the plan to increase club-level awareness and compliance with Rotary's youth protection measures for all youth-related activities.
- 5.5 Include training on risk management and insurance at pre-PELS or PELS.

#### Action Plan

- Encourage the District Governor to meet with the District Finance Committee early each Rotary year to implement a strategic approach for allocating surplus District funds and determining a minimum amount necessary to fund the District.
- Maintain a list of potential District-level leaders that is updated at least every six months by District leadership.
- Encourage committee chairs to appoint assistant committee chairs as appropriate at the District level.
- Require all Presidents-Elect to complete Rotary's *Protecting Youth Program Participants* online course and sign the District 6420 Youth Protection Policy statement of compliance to conduct youth-related programming.
- Require all Presidents-Elect to receive training on risk management and insurance.