

Rotary District 9510

Portfolio Action Plans

Aligned to the District Action Plan Overview

2026–27

District Governor Tim Mee



Contents

Each portfolio includes a 1–2 page action plan

Portfolios

- Membership –
- The Rotary Foundation –
- Governance (incl. protection) –
- Youth Programs & Service Projects
- Learning & Development
- Communications / IT / Public Image
- Rotaract
- Finance

Format

- Purpose
- Outcomes & targets
- Measures
- Delivery plan (by quarter)

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2026-27 President
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Membership – Action Plan 2026–27

Lead: Damian Leach • Purpose, outcomes and key targets

Purpose

- Grow and retain members across all clubs using coordinated District support.
- Strengthen sustainability through consistent club-level performance and pipeline development.

Key outcomes (what success looks like)

- Net +30 membership growth across the District by 30 June 2027.
- Retention $\geq 95\%$ through onboarding, engagement and early intervention.
- 2 clubs in the new-club development pipeline (tracked monthly).
- Increase under-45 participation (target: $\geq 10\%$ growth under 45) and lift alumni conversion (target: $\geq 5\%$ of total).
- Improve membership experience: 75% clubs implement 'First 90 Days' and aim for $\geq 75\%$ satisfaction score.

Measures

- Monthly net movement dashboard; quarterly Board review.
- Retention rate and onboarding adoption (club reporting).
- Pipeline status and milestone progression for new clubs.



Membership – Delivery plan

What we will do and when (by quarter)

Delivery plan (by quarter)

Q1 (Jul–Sep)

- New-member nights / engagement pulse checks
- Kick off coordinated attraction/retention campaign
- Deliver Membership Action Plan (MAP) Workshop

Q2 (Oct–Dec)

- Roll out First 90 Days onboarding tools
- Early intervention for at-risk clubs
- Under-45 / alumni pathways promoted

Q3 (Jan–Mar)

- Quarterly performance review; targeted coaching
- Convert alumni and Rotaract pathways
- Start pipeline tracking for new clubs

Q4 (Apr–Jun)

- Final push on growth targets
- Retention review and lessons learned
- Confirm year-end results and next-year pipeline

Reporting rhythm

Quarterly board update • Early intervention if off-track



Foundation – Action Plan 2026–27

Lead: PDG Peter Schaefer • Purpose, outcomes and key targets

Purpose

- Increase Foundation awareness, giving and impact through better enablement and events.
- Make District Grants simpler to access, track and audit.

Key outcomes (what success looks like)

- All District Grant information consolidated on one platform by Aug 2026 (before applications close).
- Major promotion of EREY/Centurion across clubs and individuals throughout the year (review quarterly).
- Increase general fundraising and EPN donations in 26-27 year
- Deliver a substantial Foundation awareness/fundraising event by Mar 2027 (target 200+ attendees).

Measures

- Platform delivered and reviewed (stakeholder feedback).
- Event attendance, bookings and fundraising metrics.
- Quarterly participation/giving/donations review using RI records.



Foundation – Delivery plan

What we will do and when (by quarter)

Delivery plan (by quarter)

Q1 (Jul–Sep)

- Implement District grants platform and process
- Benchmark other districts; stakeholder review
- Early EREY/Centurion promotion begins
- Develop a targeted club giving/donation plan

Q2 (Oct–Dec)

- District Grants post-application review (Oct)
- Event concept/venue and key guest planning
- Ongoing promotion of giving/donations from clubs & members
- Quarterly giving review

Q3 (Jan–Mar)

- Marketing and bookings for Mar event
- Ongoing promotion of giving/donations from clubs & members
- Deliver Foundation event. measure participation and giving lift

Q4 (Apr–Jun)

- Continue EREY/Centurion promotion
- Review data on giving/donations to date.
- Final push for giving / donations from clubs/members
- Capture lessons and handover

Reporting rhythm

Quarterly board update • Early intervention if off-track



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Governance – Action Plan 2026–27

Lead: Andrew Johnson • Purpose, outcomes and key targets

Purpose

- Support clubs with best-practice governance, compliance and risk reduction.
- Strengthen District capability through succession planning and better tools.

Key outcomes (what success looks like)

- Succession plan implemented for governance team (backup roles, centralised documents, procedure manual).
- Legal panel established (3–5 members) by Dec 2026 to support clubs.
- District by-laws updated for adoption at AGM November 2027.
- Club Governance resources uplift: checklist updated (Dec 2026), better access to certificates of currency (Jul 2026), quarterly website updates.
- Protection Policy updated and adopted by District Board (Stage 1 by Dec 2026) and rollout begins in 2027.

Measures

- Milestone completion (Sep/Dec/Jun deliverables).
- Legal panel established and operating.
- Protection policy adoption and rollout milestones.



Governance – Delivery plan

What we will do and when (by quarter)

Delivery plan (by quarter)

Q1 (Jul–Sep)

- Update position descriptions (by Sept)
- Improve access to certificates of currency (Jul)
- Protection policy consultation continues

Q2 (Oct–Dec)

- Centralise documents; appoint backup roles (by Dec)
- Legal panel position description + communicate
- Protection policy endorsed by Board (Dec)
- Review & update Website information (Dec)

Q3 (Jan–Mar)

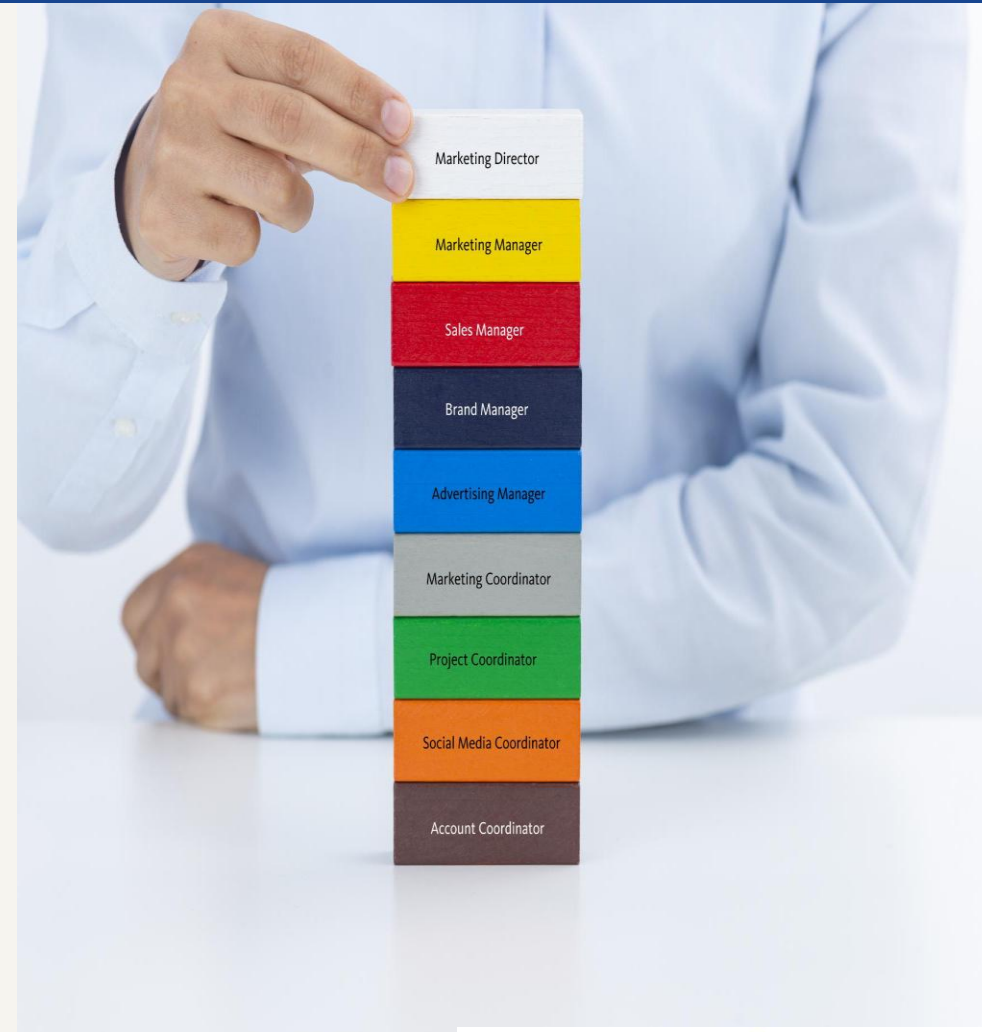
- By-laws drafting and consultation
- Publish updated Club Governance Checklist.
- Commence protection policy rollout planning

Q4 (Apr–Jun)

- Procedure manual completed (Jun)
- Identify further club info needs (Jun)
- Prepare AGM 2027 by-laws pathway

Reporting rhythm

Quarterly board update • Early intervention if off-track



Youth Programs & Service Projects – Action Plan 2026–27

Lead: Bill Marles • Purpose, outcomes and key targets

Purpose

- Increase participation and impact of Rotary youth programs and service projects through simple marketing and proactive engagement.
- Make it easy for clubs, schools, sponsors and participants to understand and support youth programs and service projects

Key outcomes (what success looks like)

- Improve programs/projects online marketing by Jul/Aug 2026 (public-facing 'helicopter view' pages + calls to action).
- Increase awareness of dates/deadlines using phone + email + SMS campaigns (ongoing).
- Build a central District image/video bank and a rolling library of case studies/testimonials.
- Implement simple reporting: primary programs provide one-page updates before Board meetings; quarterly review.

Measures

- Participation uplift vs prior year (clubs/schools/businesses).
- Engagement metrics: clicks/shares/inquiries.
- On-time one-page program reporting; quarterly Board review.



Youth Programs & Service Projects– Delivery plan

What we will do and when (by quarter)

Delivery plan (by quarter)

Q1 (Jul–Sep)

- Issue briefing sheet; refresh website content
- Create simple program calendars (club + public)
- Start photo/video capture and storage

Q2 (Oct–Dec)

- Run deadline awareness campaign (phone/email/SMS)
- Publish first case studies and testimonials
- Program leads submit one-page updates

Q3 (Jan–Mar)

- Expand image bank; short videos in use
- Continue outreach to low-participation clubs
- Board summary highlights needs/issues

Q4 (Apr–Jun)

- Compare participation vs prior year
- Refresh calendars; plan next cycle
- Sustain reporting cadence and handover

Reporting rhythm

Quarterly board update • Early intervention if off-track



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Learning & Development – Action Plan 2026–27

Lead: Di Clements • Purpose, outcomes and key targets

Purpose

- Provide purposeful learning that equips Presidents, Boards and members to lead confidently.
- Increase engagement with My Rotary learning and RLI opportunities.

Key outcomes (what success looks like)

- Increase participant engagement to 90% of PEs at President Elect Learning Seminars and 75% of clubs represented at Club Leaders Learning Seminar (District Assembly) for club officers in 26-27
- Increase engagement with My Rotary Learning Centre (targets include stepping up to 90% by Dec 2026).
- Deliver RLI opportunities and increase club participation (target: 50% of clubs have an attendee).
- Ongoing coaching/mentoring and access to Rotary expertise and resources.

Measures

- Attendance and engagement rates (events and My Rotary learning centre).
- Club participation in RLI.
- Feedback surveys and improvement actions.



Learning & Development – Delivery plan

What we will do and when (by quarter)

Delivery plan (by quarter)

Q1 (Jul–Sep)

- Measure results from May 2026 PELS and Club Leaders Learning Seminar.
- Learning calendar published and promoted
- DG check-in learning session (Sept)
- Support access to My Rotary learning centre

Q2 (Oct–Dec)

- RLI opportunity delivered (Oct)
- Drive learning-centre engagement toward Dec target
- Collect feedback and adjust

Q3 (Jan–Mar)

- Virtual learning (Feb)
- Recruit/prepare presenters for Apr RLI
- Target clubs without engagement

Q4 (Apr–Jun)

- RLI opportunity delivered (Apr)
- Review participation and outcomes
- Update learning approach for next year

Reporting rhythm

Quarterly board update • Early intervention if off-track



Communications / IT / Public Image – Action Plan 2026–27

Lead: Robin LeGallez • Purpose, outcomes and key targets

Purpose

- Provide consistent, timely communications with Club Leaders, RCLs and Rotary members, without inbox overload.
- Strengthen public image, ensure the website and social media channels are a reliable, up-to-date resource.

Key outcomes (what success looks like)

- Consolidate District communications, improve information exchange with Clubs, RCLs and members. Introduce monthly Communique to clubs. Reduce ‘email overload’ complaints.
- Establish a Public Image committee and define KPIs and a multi-year plan.
- Support greater use of Facebook and other Social media channels to promote district activities and programs
- Update and promote the District website; portfolio leads review/update their pages; quarterly checks.

Measures

- Member feedback on information exchange.
- PI committee established; KPIs defined and reviewed.
- Increased social media engagement
- Quarterly website content checks completed.



Communications / IT / Public Image – Delivery plan

What we will do and when (by quarter)

Delivery plan (by quarter)

Q1 (Jul–Sep)

- Agree comms rhythm and channels with Board
- Define website update owners & schedule
- Create regular social media posts and information exchange communicate with clubs/members
- Recruit PI committee members

Q2 (Oct–Dec)

- Launch consolidated comms approach
- PI committee sets KPIs and draft plan
- First quarterly website and social media review

Q3 (Jan–Mar)

- Measure feedback and refine comms approach /impact
- Publish PI plan and campaign calendar
- Website content refresh cycle

Q4 (Apr–Jun)

- Annual review of KPIs and comms effectiveness
- Portfolio updates completed
- Handover and improvements for 27–28

Reporting rhythm

Quarterly board update • Early intervention if off-track



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Rotaract – Action Plan 2026–27

Leads: Tyson Puckridge, Jordan Klose, Christopher Mark • Purpose, outcomes and key targets

Purpose

- Two clubs a shared vision. (collaboration)
- Strengthen club purpose, community engagement and membership development

Key outcomes (what success looks like)

- Develop a strong working relationship between the two current Rotaract clubs, using that partnership and collective experience to achieve a net gain in membership across both clubs.
- Engage with our surrounding community organisations, identify community support projects and amplify our impact.
- Establish broader communication channels to promote our activities and presence.
- Strengthen our engagement with Rotary youth programs and local Rotary club activities.

Measures

- Member input. Member feedback.
- Measure community project impact. Club membership outcomes
- Increased exposure in social media and other media channels
- 6 monthly reviews



Rotaract Clubs – Delivery plan

What we will do and when (by quarter)

Delivery plan (by quarter)

Q1 (Jul–Sep)

- July – Club members to establish a Rotaract Club Action Plan for 26-27
- Participate in District Alumni Event .
- Start work of community engagement strategy

Q2 (Oct–Dec)

- Planning towards a community project or support activities for a Community Organisation.
- Membership development initiatives
- Dec – Review progress on Action Plan first 6 months

Q3 (Jan–Mar)

- Establish Action Plan priorities for next 6 months
- Continue community engagement/project activities
- Implement Action priorities agreed by each club

Q4 (Apr–Jun)

- Final push on membership development initiatives
- Assess membership participation in community activities and complete a member satisfaction review
- Handover to new leaders with suggested Action Plan improvements for 27–28

Reporting rhythm

Quarterly board update • Early intervention if off-track



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Finance – Action Plan 2026–27

Lead: Tony Simmons • Purpose, outcomes and key targets

Purpose

- Transition District banking to Beyond Bank and maximise interest income from available cash.
- Reduce levies/dues through smarter investments and funding of membership growth initiatives.

Key outcomes (what success looks like)

- Transfer all D9510 bank accounts (operating, savings, Youth Exchange) to Beyond Bank by end of July 2026.
- Achieve approx. \$12,500 interest income p.a. via optimised term deposits (4%+) and cash rates (2.7%+).
- Fund new PI activities, membership initiatives, RCG/RCL activities and annual Learning & Development program
- Reduce the District Operating Levy/Dues through increased investment returns and expanded membership base.

Measures

- Account transfer completion by end of July 2026; confirmed at August DFC and Board meetings.
- Interest income tracked via D9510 financial reports; year-end review against \$12,500 target.
- Membership growth and funding approvals reviewed at regular DFC and Board meetings.



Finance – Delivery plan

What we will do and when (by quarter)

Delivery plan (by quarter)

Q1 (Jul–Sep)

- Transfer D9510 accounts to Beyond Bank (Jul)
- Confirm account transfers at Aug DFC/Board
- Set up ongoing term deposits and negotiate best rates

Q2 (Oct–Dec)

- Review investment strategy and interest returns
- Assess new PI funding requirements,
- Monitor Membership initiatives costs and RCG/RCL funding
- Quarterly financial report and membership review

Q3 (Jan–Mar)

- Mid-year review of interest income vs target
- Continue funding membership growth initiatives
- Renegotiate rates if market conditions change
- Prepare Financial budget for year 27-28

Q4 (Apr–Jun)

- Year-end financial review against all targets
- Assess levy reduction potential for 27–28
- Capture lessons learned and handover

Reporting rhythm

Quarterly board update • Early intervention if off-track



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