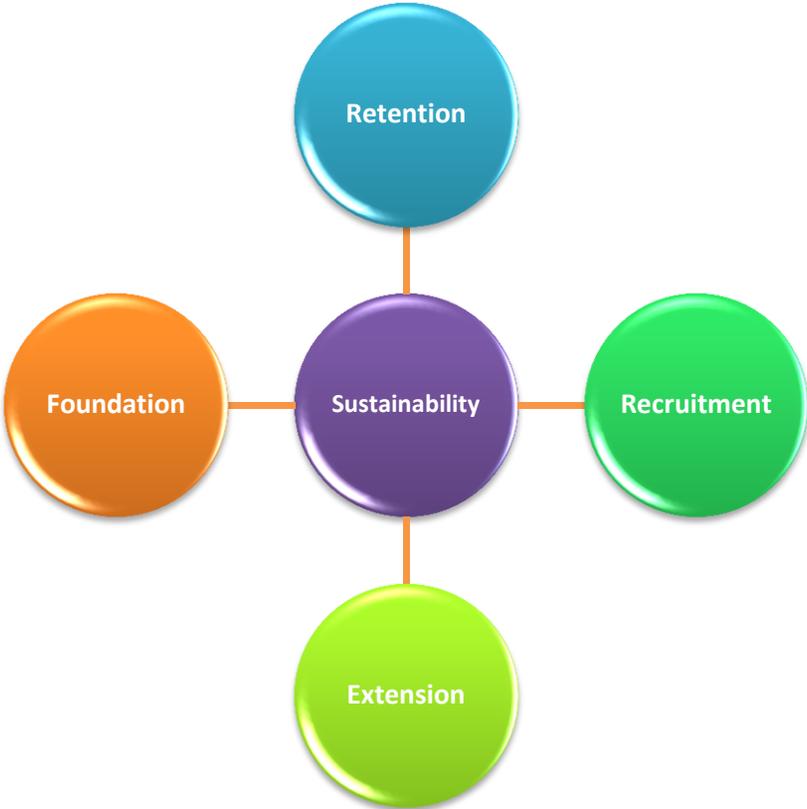


DISTRICT 7820 2012-2016 STRATEGIC PLAN



JANUARY 2012

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INTRODUCTION AND BACKGROUND

Brief surveys were distributed to clubs and District leaders on Friday June 17, 2011. The deadline for responses was August 31, 2011. Although District leaders and clubs were given a number of reminders over the summer, responses were very slow coming in and the overall rate of return was disappointing. An extension of the deadline to September 9 resulted in a small number of additional responses. Nineteen clubs responded – a response rate of 41%. Eight leaders responded – a response rate of only 30%.

In a survey (such as this) which involves a small number of respondents, a response rate of 50% or better and/or a high level of consistency between respondents is necessary in order for there to be confidence that the responses are representative of how most people feel. As will be seen below, the significant majority of responses focused on two issue areas: membership and Communication & Information Sharing. As a result, and given the high level of consistency, we can probably safely conclude that these issues are representative of how most Rotarians feel. We can be less confident about the other issue areas that emerged, although they certainly are important.

Priority Areas

First Priorities: These were discussed SIGNIFICANTLY more often than any other issues and should be considered respondents' greatest concerns:

1. Membership
2. Communications and Information sharing

Secondary Priorities: These were discussed regularly, but MUCH less often than first priority areas. They should be considered important concerns.

3. Cooperation and Collaboration
4. Public Relations
5. Training



Other issues: These issue areas were mentioned occasionally and should be noted, but not considered to be priorities.

- Geography
- Planning and organization
- Club effectiveness
- History of service
- Fundraising
- Being proactive
- Vision and purpose
- Rotary International Foundation
- Assistant District Governor Role

Given the above, it is interesting to note the District's 2007 – 2012 Strategic Plan priorities:

- Enhance membership recruitment, development and retention strategies
- Enhance training for club members, club leaders and district leaders
- Enhance Rotary's public image within the district
- Improve communication and information sharing systems within the District. This would include between clubs, groups of clubs as well as district leadership.
- Simplify the District leadership and committee structure

A report on the survey results was prepared and posted on the district web page and responses invited. The report was then presented to the November 4-6 2011, District Leadership meeting. The plan was revised based on this feedback, posted on the District web site for further input. Feedback received was incorporated in the plan and presented to the February 2012 District leadership meeting.



THE PLAN



OUR VISION

We will achieve a measurable improvement in membership sustainability and support. We will know we've been successful because:

- ✓ Club membership is increasing
- ✓ We have chartered new clubs
- ✓ Contributions to the Rotary Foundation continue to grow
- ✓ Conference attendance rises year to year
- ✓ There is increasing competition for District leadership roles

OUR MISSION

Inspired individuals who translate their passions into relevant social causes to change lives in communities.

OUR CORE VALUES

Service

We believe that our service activities and programs bring about greater world understanding and peace. Service is a major element of our mission. Through the plans and actions of individual clubs, we create a culture of service throughout our organization that provides unparalleled satisfaction for those who serve.

Fellowship

We believe that individual efforts focus on individual needs, but combined efforts serve humanity. The power of combined efforts knows no limitation, multiplies resources, and broadens our lives and perspectives. Fellowship leads to tolerance and transcends racial, national, and other boundaries.



Diversity

We believe Rotary unifies all people internationally behind the ideal of service. We encourage diversity of vocations within our membership and in our activities and service work. A club that reflects its business and professional community is a club with a key to its future.

Integrity

We are committed to and expect accountability from our leaders and fellow members, both in the results of our efforts and in the processes we use to accomplish our goals. We adhere to high ethical and professional standards in our work and personal relationships. We are fair and respectful in our interactions, and we conscientiously steward the resources entrusted to us.

Leadership

We are a global fellowship of individuals who are leaders in their fields of endeavor. We believe in the importance of leadership development and in leadership as a quality of our members. As Rotarians, we are leaders in implementing our core values.

All of these core values are reflected in the Object of Rotary and The Four-Way Test, which we use in our daily lives. They inspire us to foster and support the ideal of service for developing and maintaining high ethical standards in human relations.



PRIORITY DIRECTIONS

We will focus on the following priorities:

- Retaining current members and ensuring clubs offer compelling reasons for members to stay
- Recruiting new members and increasing membership diversity
- Club extension and forming dynamic new clubs
- Strengthening our relationship with The Rotary Foundation

Strategies, actions and key performance indicators have been identified for each priority. Focus on each of the following areas will help ensure successful achievement of the above priorities:

- Public Relations
- Communications and Information Sharing
- Cooperation and collaboration
- Training

As we move forward and to ensure the plan achieves the greatest possible success, it is important that the plan is treated as a living document. Priorities, strategies and timelines can be expected to change and evolve as progress is achieved and circumstances change. Indeed, by 2016, the plan should look dramatically different than today.

Three specific actions are essential to ensure progress:

1. During each Rotary year, the District Governor Elect will be responsible for supervising the plan and reporting on progress at each meeting of the District Board of Directors and at each District leadership retreat.
2. Specific strategies and associated actions, responsibilities and time lines will be incorporated into District Board Agenda and regular District retreats.
3. An annual report on issues and progress will be presented to the District Conference and Annual General Meeting.



**PRIORITY: RETAINING CURRENT MEMBERS AND ENSURING CLUBS OFFER COMPELLING REASONS
FOR MEMBERS TO STAY**

Strategy	Specific Goals	Responsibility	Deadline	Measures of Success
Support clubs to address their membership issues and concerns	Invite clubs to receive District assistance to address their issues and concerns.	District Governor, Assistant Governors	June 30, 2012	Clubs selected
	Develop strategies to help clubs address their issues and concerns.	District leaders, membership committee	December 31, 2012	Strategies developed
	Encourage clubs to find ways to engage and involve families to strengthen club and family ties.	District leadership, support team, membership committee	Ongoing	Family involvement increasing
	Create a club support team responsible for working directly with clubs requesting support.	District Governor, Membership Chair	June 30, 2012	Team selected
	Provide change management and leadership training for people working with clubs as well as club leaders.	District Trainer	December 31, 2012	Training complete
	Develop a standardized club evaluation tool for clubs and District leaders to use to assess club strength.	Membership chair	June 30, 2012	Tool created



Strategy	Specific Goals	Responsibility	Deadline	Measures of Success
Provide Training for club members	Develop innovative new training methods that are easy and inexpensive for club members to access.	District Trainer	December 31, 2012	Methods in use
	Survey clubs to determine their training needs.	District Trainer	June 30, 2012	Survey complete
	Develop innovative new ways to improve PETS/SETS training.	District Governor, District Trainer, District Chairs, PDGs	June 30, 2012	New strategies being implemented
	Increase collaboration and information sharing with Rotary Leadership Institute	District Governor, District Trainer, RLI leadership	December 31, 2012	Collaboration increasing
	Develop innovative strategies to increase District conference and RLI participation.	District Governor, Conference Chair, District Trainer	May 30, 2013	Attendance is increasing
	Develop a training team comprised of Rotarians knowledgeable in various subject areas to provide training for interested clubs.	District governor, District Trainer	June 30, 2012	Team established
Public Relations	Develop a public relations campaign/set of strategies designed to increase pride among current Rotarians as well as attract new members.	Public Relations Committee	July 1, 2012	Campaign in place



Strategy	Specific Goals	Responsibility	Deadline	Measures of Success
Improve District support to clubs	Strengthen area meetings and president's councils and encourage increased club collaboration.	Membership team, Assistant Governors	Ongoing	Collaboration increases
	Implement a 3 year succession plan for such key areas as Assistant Governor, Membership Chair, Foundation Chair, Web Master, etc.	District Governor	Ongoing	Plan in place for all key positions
	Continue to strengthen web page as a communication vehicle for club use.	Web Master, District leadership	Ongoing	Site traffic increases
	Strengthen and expand the District Awards committee	District Governor	June 30, 2012	Committee established
	Develop innovative strategies to overcome geographic challenges.	District leadership	December 31, 2012	Strategies in place
	Sponsor/provide membership development seminars in every area of the district.	Membership Chair, committee	June 30, 2013	Seminars held successfully
	Determine whether the District Conference is best held in the spring or fall.	Past District Governor	June 30, 2012	Report delivered



PRIORITY: RECRUITING NEW MEMBERS AND INCREASING MEMBERSHIP DIVERSITY

Strategy	Specific Goals	Responsibility	Deadline	Measures of Success
Public Relations	Develop a public relations campaign and/or set of strategies designed to promote Rotary to potential new members.	PR Committee	July 1, 2012	Campaign in place
	Encourage clubs to use RI and District PR materials	District leaders, PR committee	Ongoing	Club use of materials increases
	Create a special campaign to publicize and celebrate 100 years of Rotary in the District and encourage clubs to participate in the campaign.	PR Committee	January 1, 2013	Campaign launched
Establish membership recruitment targets for each year	Achievable membership targets are established, along with a plan to achieve these as well as progress measures	Membership Chair and committee	March 31, 2012	Targets set and achieved
Support club recruitment efforts	Encourage joint membership drives in selected communities	Membership committee, Assistant Governors	June 30, 2013	Successful drives completed
	Encourage clubs to recruit based on potential members' needs: acquaintance, contacts, fun	Membership Committee	Ongoing	A majority of clubs show a membership increase



Strategy	Specific Goals	Responsibility	Deadline	Measures of Success
	Provide clubs with recruitment strategies that focus on gender balance, diversity and new generations	Membership team, District trainer	December 31, 2012	Strategies provided
	Show clubs how social media can be used as a tool to recruit and retain members.	Membership committee, Social Media team	December 31, 2012	Club and District use of social media increases
	Help clubs to recruit new members from Rotary Alumni	Membership committee, alumni chair	June 30, 2013	Increased numbers of alumni become members
	Create a means through which clubs can share their successful recruitment strategies.	District leaders, membership committee	June 30, 2013	Strategies being shared in all areas of District



PRIORITY: CLUB EXTENSION AND FORMING DYNAMIC NEW CLUBS

Strategy	Specific Goals	Responsibility	Deadline	Measures of Success
Public Relations	Develop a public relations campaign/set of strategies designed to promote Rotary to potential new members.	Public Relations Committee	July 1, 2012	Campaign in place
Understand the priorities of today's younger professionals.	Complete research on the kinds of service activities that appeal to 'new generations'.	Membership chair and team	June 30, 2012	Research completed
	Complete research on the kinds of groups, meetings and volunteer organizations that appeal to 'new generations.'	Membership chair and team	June 30, 2012	Research completed
	Encourage more clubs to sponsor Rotaract and Interact clubs.	Membership chair and team	June 30, 2013	New clubs organized
Establish new clubs in HRM, St. John's and Southwest Nova.	Use what is learned from the research conducted above to develop a strong value proposition to encourage 'new generations' to establish a club that reflects their interests.	Membership chair, Extension chair team and champions	September 30, 2012	Value proposition created
	Appoint an e-club champion to drive the creation of at least one e-club.	District Governor, Membership chair, Extension chair	July 1, 2012	Chair appointed
	Charter at least one e-club.	Membership Chair, Extension chair, e-club champion	June 31, 2013	Club chartered



Strategy	Specific Goals	Responsibility	Deadline	Measures of Success
	Appoint an extension champion in each of HRM, St. John's and Southwest Nova.	District Governor, Membership Chair, Extension chair, Membership Team	July 1, 2012	Champions appointed
	Encourage the development of innovative new club models that appeal to new generations.	Membership team and champions	Ongoing	A variety of models are available
	Charter one new club in each of HRM, St. John's and Southwest Nova.	Extension champions, Membership Team	June 30, 2013	Clubs chartered



PRIORITY: STRENGTHENING OUR RELATIONSHIP WITH THE ROTARY FOUNDATION

Strategy	Specific Goals	Responsibility	Deadline	Measures of Success
Implement The Rotary Foundation Future Vision Plan	Provide training to District Leadership and Foundation team on Future Vision Plan.	Foundation Chair	September 30, 2012	Training complete, with positive feedback
	Begin Grant Management Training Seminars.	Foundation Chair, District Trainer	July 1, 2012	Seminars complete
	Provide training for clubs on The Future Vision Plan.	Foundation Chair	July 1, 2012	Training completed with positive feedback
	Begin qualification process for District and Clubs for Future Vision.	Foundation Chair, District Leadership Team	January 1, 2013	Qualification successful
	Appoint District Foundation chair for 2013 – 2015 to ensure continuity and stability.	District Governor	March 31, 2013	Chair appointed
	Recruit a strong Foundation team to ensure continuity and stability.	District Leadership, Foundation Chair	March 31, 2013	A strong team is in place.
	Survey clubs to learn their service interests for Global Grants.	Foundation Chair	December 31, 2012	Survey complete



Strategy	Specific Goals	Responsibility	Deadline	Measures of Success
	Appoint District Grants sub-committee chair.	District Governor, Foundation chair	January 31, 2013	Chair appointed
	Appoint Global grants subcommittee chair.	District Governor, Foundation chair	March 31, 2013	Chair appointed
	Global Grant proposal(s) submitted.	Foundation Chair, Global Grants Chair	March 31, 2013	Proposal(s) submitted
	District Grant proposal(s) submitted.	Foundation Chair, District Grant Chair	April 30- 2013	
	Clubs invited to begin submitting applications for District Grants (for 2013-14)	Foundation Chair, District Governor	February 1, 2013	Proposals submitted
Increase club and individual contributions to the Foundation	Provide training for clubs on The Future Vision Plan and new Grant application processes.	Foundation Chair, District Trainer	December 31, 2012	Training Complete
	Provide informational resources to clubs on the advantages and benefits of contributing to the Foundation.	District Trainer	Ongoing	Information Resources being provided



Strategy	Specific Goals	Responsibility	Deadline	Measures of Success
	Encourage clubs to participate in District and Global Grants and to contribute to the Foundation as a means for doing so.	District Governor, Foundation Chair, District Trainer	Ongoing	Encouragement and support being provided
Strengthen the Youth Exchange Program	Provide training and encouragement to clubs on the benefits of the Program.	YEP Chair, District Trainer	Ongoing	Training and support being provided
	Divide Youth Exchange Committee responsibilities between operations and administration	District Governor, Foundation Chair	July 1, 2012	Sub-Chairs appointed
	Encourage clubs to develop innovative strategies for implementing the program, such as co-hosting with other clubs and recruiting host families.	YEP Chair, District Trainer	Ongoing	Support and encouragement being provided
Publish a list of projects that clubs can participate in	Clubs, District leaders and RI will be surveyed to identify a variety of projects that clubs can consider for participation.	Foundation team	October 31, 2012	List published on District web page
Establish at least one District project on which clubs can partner	Create a short list of larger projects and distribute the list to clubs, inviting them to choose one or more as one they would like to participate in.	Foundation Team	October 31, 2012	District projects(s) chosen
Establish the <i>District 7820</i>	Appoint a committee chair and members.	District Governor	July 1, 2012	Committee



Strategy	Specific Goals	Responsibility	Deadline	Measures of Success
Rotary International Humanitarian Fund as a fundraising vehicle to support club and District projects.				established
	Define Fund priorities and parameters.	Committee	October 31, 2012	Priorities established
Create District audit committee	Appoint an audit committee chair and members. Committee to be comprised of three Rotarians in good standing, who are independent and financially literate. One member must have professional accounting & audit experience, one must be a member of the district team of the day, and a third must be a PDG. Members must serve for at term of three years, during Future Vision and must be approved by the clubs at a District Conference.	District Governor	May 31, 2012	Committee established
	Define audit committee duties and responsibilities.	District Leaders, committee	October 31, 2012	Duties defined
	Define programs, projects and or processes to be subject to audits, such as Foundation Grants, overall financial spending, approval authorities, operational matters Youth Exchange, and compliance with our By Laws and those of RI.	District leaders, committee	October 31, 2012	Programs and processes identified

