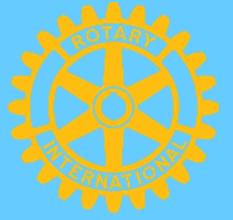


**Strategic Action Plan  
RY 2023-2026**

**Rotary**  
District 5500



***By 2026, District 5500 Rotarians and Rotary Clubs will be recognized for leading and partnering on service projects that create lasting local and global community change.***

**ROTARY INTERNATIONAL'S STRATEGIC PRIORITIES**

Increase  
our impact.

Expand  
our reach.

Enhance  
participant  
engagement.

Increase our  
ability to adapt.

# Executive Summary



Beginning in July 2022, a District-wide team of leaders was tasked with developing and drafting a new Strategic Action Plan for District 5500 in alignment with the four Action Plan priorities of Rotary International.

The 28-member planning team was selected to represent the vast diversity of the District. Participating members included a selection of current and incoming club presidents, past District Governors, leadership team members, current and new members representing all geographic regions of the District, genders, ages, ethnicities, large and small clubs, urban and rural clubs.

The Strategic Action Planning Task Force began with the development of the following **Strategic Imperative:** *“By 2026 District 5500 Rotarians and Rotary Clubs will be recognized for leading and partnering on service projects that create lasting local and global community change.”*

Next, the structure and District strategic goals were developed to best support Rotary clubs and to align with Rotary International’s four strategic priorities.

## Rotary International’s Strategic Priorities



Increase our impact.

*“As People of Action We Make Decisions Grounded in Evidence”*

This priority focuses on building the practices, infrastructure, and capacity needed to define, measure, track, and analyze data from our service projects in a much more effective way. It also means making sure we’re focusing our efforts, attention, and resources in the most meaningful ways.



Expand our reach.

*“As People of Action We are Inclusive, Engaging, Compassionate and Ambitious on behalf of the World”*

This priority focuses on how we can share our values with new audiences, create new ways to bring people together to experience the power of Rotary.



Enhance participant engagement.

*“As People of Action We Create Meaningful Relationships across Decades and Continents”*

Enhancing participant engagement is assessing what we offer and looking for ways to create additional value. It’s creating new programs, events, learning opportunities, and more that attract new people of action and leaders into our clubs and programs.



Increase our ability to adapt.

*“As People of Action We Seek New Perspectives and New Ideas that can Strengthen Rotary and Create Lasting Change ”*

We need to look at how we can adapt more quickly to a changing world, how new perspectives can strengthen Rotary, and what new ideas could create lasting change to establish a strong foundation for innovation, sustainability, and growth.

# RY 2023-26 District 5500 Strategic Action Plan



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## Thank you to all the Strategic Action Plan Development Team Participants!

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### District 5500 Rotarians:

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### 2022-23 DG Line:

DG Anita McDonald  
DGND Bob Grady  
PDG Kirk Reed

DGE Don Jorgensen  
IPDG Hank Huisling  
PDG Randy Brooks

DGN Sue Archibald-Krahe  
PDG Ellie Patterson  
PDG Teree Bergman

## How We Got Here...

- July 2022: Strategic Action Planning Session #1—Organized a representative planning team of 28 members from multiple clubs, positions and regions across the District
- August 2022: Conducted initial District-wide stakeholder action plan survey. Received input from over 72 District Rotarians.
- September 2022: Strategic Action Planning Session #2  
District Conference Stakeholder Update & Discussion - Received feedback and input from 38 participants.
- October 2022: Strategic Action Planning Sessions #3 & #4 - Conducted SWOT Analysis
- November 2022: Strategic Action Planning Session #5 & #6—Plan Development
- December 2022: Final Strategic Action Plan Draft approved by task force for review and comment by District leaders
- February 2023: Final Review and Comment by District Leaders - *Final Strategic Action Planning Session*
- March 2023: *Submission to District Corporate Board for approval  
Distribute to District Club Presidents, Presidents-elect, and club members. Begin Implementation of 2023-2026 District 5500 Strategic Action Plan*

# Executive Summary



## ROTARY INTERNATIONAL'S STRATEGIC PRIORITIES

**Increase our impact.**

**Expand our reach.**

**Enhance participant engagement.**

**Increase our ability to adapt.**

## ROTARY DISTRICT 5500 STRATEGIC ACTION PLAN PRIORITIES

**Increase Impact in Local and Global Communities**

*Strategic Objectives:*

1. Increase the measurable impact of local and global service projects to meet key community needs
2. Facilitate development of multi-club service projects
3. Create a dedicated club service projects webpage
4. Increase Club participation in the District grant program

**Expand our Reach**

*Strategic Objectives:*

1. Increase member and community awareness of Rotary's impact
2. Increase Rotary membership and participation.
3. Develop opportunities to work with other organizations and businesses to strengthen Rotary's impact.
4. Promote District actions to value diversity, inclusion and respect for people of all backgrounds.

**Enhance Participant Engagement**

*Strategic Objectives:*

1. **Strengthen District education and training to support membership guided leadership development and service project implementation**
2. **Increase giving in all areas of The Rotary Foundation**
3. **Increase member retention**

**Increase Our Ability to Adapt**

*Strategic Objectives:*

1. Expand and promote District-wide Club support services
2. Increase utilization of District and Club websites and online tools
3. Increase club participation and adaptability
4. Increase member participation at District level

### OUR STRATEGIC IMPERATIVE

*“By 2026 District 5500 Rotarians and Rotary Clubs will be recognized for leading and partnering on service projects that create lasting local and global community change.”*





## Goal 1: Increase Impact in Local and Global Communities.

*People of action are effective problem-solvers. Why do Rotarians achieve so much? We invest in relationships. We make decisions grounded in evidence. We know how to mobilize our networks to create solutions that last. And we're always learning from our experiences in projects, clubs and careers.*

### **Objective 1.1: Increase the measurable impact of local and global service projects to meet key community needs.**

1. By July 1, 2023, the District Governor (DG) will Identify a District Local Service Projects Chair.
2. By July 1, 2023, the District Governor will create a District Service Projects Team that will include the local and international service chairs, global grants chair, and others.
3. By September 30, 2023, the District Service Project Team will create a network to identify and promote resources to support clubs in accomplishing the following:
  - a. Identifying & assessing key community needs.
  - b. Prioritizing and selecting community needs.
  - c. Setting measurable goals.
  - d. Developing service project plans.
  - e. Engaging in multi-club projects.
  - f. Documenting project outputs and outcomes.
  - g. Establish processes which provide support for clubs applying for, implementing and evaluating global grants.
4. By March 1, 2024, the District Learning & Education Team and Club Presidents will identify new opportunities for partnering with other service organizations and business groups.
5. By June 2024, the District Service Project Team will determine collective metrics to gather and will develop an output and outcomes report for all District clubs, events and activities.



## Goal 1: Increase Impact in Local and Global Communities (continued)

### Objective 1.2: Facilitate development of multi-club service projects.

1. In October 2023, the District Conference Team will elevate the presence of multi-club service projects by:
  - a. Hosting a multi-club service project education session.
  - b. Identify clubs to host a multi-club service project display in the House of Friendship.
2. By July 1, 2024, the District Service Project Team will develop and promote a strategy to:
  - a. Identify and promote Local & /Global Grant opportunities.
  - b. Identify promote other grant opportunities.

### Objective 1.3: Create a dedicated club service projects webpage.

1. By December 1, 2023, the Service Project team and Tech Team will develop a Club Service Project hub to highlight project listings, needs, partner opportunities, and resources, including:
  - a. Showcasing successful Multi-Club service projects.
  - b. Linking to Club resources and training activities.
  - c. Creating a system to gather club project information for inclusion on the District website.
  - d. Linking to all District club websites.
  - e. Providing helpful templates for service project development.

### Objective 1.4: Increase Club participation in the District Grant program.

1. By July 1, 2023, the Grants Committee will revise District grant policy to:
  - a. Make grants easier for clubs to use.
  - b. Enhance support of the Annual Fund.
  - c. Increase the number of clubs utilizing District grants.
2. By July 1, 2023, the Grants Committee will add a District grant consultant to the Club Service Support Team.





## Goal 2: Support Club Efforts to Expand Our Reach

*People of action activate and inspire others, giving them hope that the world can change for the better—and that they can be a part of that change. We know there are people seeking both a greater sense of purpose and the kind of person-to-person involvement the digital realm can't provide. We have what it takes to be their first choice.*

### Objective 2.1: Increase member and community awareness of Rotary's impact.

1. By July 1, 2023, the DG will identify a District Public Image Chair and Team.
  - a. By September 1, 2023, the Public Image Team (PIT) will analyze the Eller Project recommendations and incorporate the results into new District marketing efforts to demonstrate Rotary Impact and assist with Club exposure.
  - b. By December 1, 2023, the PIT will create an outreach and marketing plan that will include plans for increasing social media reach and outreach for District trainings/events.
  - c. By March 1, 2024, the PIT will endeavor to increase and standardize use of Rotary Brand by all Clubs.
  - d. By October 1, 2024, the PIT will assess and update all District communications forms and activities and establish a user-friendly District calendar.
2. By January 1, 2024, the Public Image Team will increase/develop new resources and opportunities to work with other organizations and businesses, industry, non-profits to strengthen Rotary's impact.
  - a. Aid with club communication efforts to connect with members and relevant community groups using a range of multi-media and social media tools.
  - b. Update or create new methods for effective posting and sharing of information between District leadership and clubs, and between clubs.
3. By June 1, 2024, the Public Image Team will develop/offer public workshops for business leadership skills and/or other workshops of interest.



## Goal 2: Support Club Efforts to Expand Our Reach (continued)

### Objective 2.2: Increase Rotary membership and participation.

1. By September 1, 2023, the membership committee will develop a Membership Action Plan that is inclusive and supports diversity, to include: Alumni outreach (e.g. former Rotaractors, Interactors, RYLA, RYE participants, former Rotarians), newly retired community members, community leaders, business owners, and working professionals.
2. By January 1, 2024, the membership committee will facilitate focus groups with young professionals to assist in the development of Rotary and Rotaract membership marketing.
3. By March 1, 2024, the membership committee will establish two community-based Rotaract Clubs in District 5500.

### Objective 2.3: Increase/develop new resources and opportunities to work with other organizations and businesses, industry, non-profits to strengthen Rotary's impact.

1. Increase mutually beneficial collaborations and partnerships by one per year.
2. Plan a community event each year that brings new businesses and organizations together around a community need or issue.

### Objective 2.4: Expand and Promote District actions to value diversity, inclusion and respect for people of all backgrounds.

1. By January 1, 2024, ensure that district committees include representation that reflects the diversity of clubs and communities served.
2. By July 1, 2024, recognize club efforts that celebrate and promote diversity and inclusion in membership, projects, and activities.





### Goal 3: Support Club Efforts to Enhance Participant Engagement

*People of action strive to understand the needs of others. Rotary is a great organization because we create meaningful relationships across decades and continents. But just like the people and communities we serve, our participants need to feel seen and heard.*

#### **Objective 3.1: Strengthen District training programs to support membership guided leadership development and service project implementation.**

1. By July 1, 2023, the DG will establish a District Learning & Development Team.
2. By November 1, 2023, the Learning & Development Team will assess club training needs and preferences.
3. By January 1, 2024, the Learning & Development Team will create a training plan to assist Club leadership, members, and District leadership.
4. By January 1, 2024, the Learning & Development Team will assess and recommend existing and/or new training program content and tools to meet evolving needs and preferences, including but not limited to the following:
  - a. RLI, RLA and Rotary Leadership Programs (new/proposed).
  - b. President-elect Training Seminar (PETS and Pre-PETS).
  - c. Assistant Governor training.
  - d. Club Succession planning.
  - e. Youth Programs management (club & District levels).
  - f. Interact Club development & leadership.
5. By January 1, 2024, the Learning & Development Team will assess and recommend preferred training delivery options, including:
  - a. Regional meetings.
  - b. District Conference.
  - c. District Assemblies.
  - d. Use of Zoom, ClubRunner/District and/or Club Database (DACdb), D5500 Website, RI website
6. By March 2024, the Learning & Development Team will create/update District Training Manuals that will be available online.



### Goal 3: Support Club Efforts to Enhance Participant Engagement (Continued)

#### Objective 3.2: Increase giving in all areas of The Rotary Foundation.

1. By July 1, 2024, the DG will establish a Foundation Task Force to create a TRF Education & Support Campaign. The Task Force will:
  - a. Create education programs on TRF for clubs to use.
  - b. Monitor and report results from Annual Fund, Triple Crown Donors, PolioPlus Society, Paul Harris Society, Major Donors, Bequest Society.
  - c. Increase Club Access to TRF information.
  - d. Increase recognition for high donor clubs and members for all fund types .
  - e. Encourage every Rotarian in D5500 to make TRF one of their personal charities.
2. By September 1, 2024, the Learning and Development team will create & distribute a quarterly District Foundation Newsletter to every Rotarian in the District.
3. By October 1, 2023, the Foundation Task Force will provide TRF presence and visibility at all District Events.

#### Objective 3.3: Increase member retention.

1. By February 1, 2024, the membership committee will support the development of at least four periodic multi-club social activities across the District.
2. By March 1, 2024, the membership committee will conduct Annual member surveys to assess member skills/interests and to support the establishment of District-based Rotary Action and Fellowship Groups.





## Goal 4: Increase Our Ability to Adapt at the Club and District Levels

*People of action are inventive, entrepreneurial, and resilient. We know what we stand for and why it matters. We're driven by a sense of optimism — a belief that we are and will continue to be essential to our communities, to the world, and to humanity.*

### Objective 4.1: Expand and promote District-wide club support services.

1. By July 1, 2024, the DG will create a District "Club Support Team" led by, but not limited to, Assistant Governors, as a resource & consulting team to:
  - a. Offer Club Visioning process.
  - b. Identify and promote Zone resources.
  - c. Provide a District central contact point for requests from Clubs.
  - d. Educate and inform Club officials at District trainings and events.
  - e. Create a hub of support services on the District website.
  - f. Establish succession models for year-to-year continuity at club and District levels.
2. By December 1, 2023, the Club Support Team will update and expand District Speakers Bureau.

### Objective 4.2: Increase utilization of District and Club websites and online tools.

1. By September 1, 2023, the Club Support Team will coordinate with key District committees to promote and provide hands-on training for use of ClubRunner, District website resources, and Rotary.org that will incorporate the following strategies:
  - a. Short videos.
  - b. Zoom presentations.
  - c. Periodic emails.
  - d. Club/Regional trainings.
2. The Club Support Team will coordinate with key District committees to review and update online content and publicize changes on a monthly basis.

### Objective 4.3: Increase Club participation and adaptability.

1. By March 1, 2024, the Club Support Team will develop recommendations and suggestions for:
  - a. Club meeting types and formats.
  - b. Alternative club inductions, ceremonies/activities.
  - c. Alternative club schedules.
  - d. Paul Harris Fellowship presentations.
  - e. Conduct club "Health Checks" and periodic member surveys.
  - f. Club-level environmental awareness practices.
2. By March 1, 2024, the Club Support Team will Identify District speaker/consultant reference list for club leaders re: meeting management/club leadership support, etc.
3. By March 1, 2024, the Club Support team will create a plan to provide periodic newsletter/e-mail reminders and articles highlighting new RI and Club flexibility.

### Objective 4.4: Increase member participation at District level.

1. By July 1, 2024, the DG will recruit at least one Member from each Club to a District Committee.
2. By September 1, 2024, the Learning and Development and Tech Teams will create an "Impact Dashboard" on District website to provide monthly metrics re: Service, membership, TRF giving, etc. by District and Club.