

DEC District 5340 Strategic Planning September 19, 2009 meeting results included

District Vision:

We are a thriving organization whose members improve lives locally and globally through the joys of Service Above Self.

District Mission:

The mission of Rotary District 5340 is to help the individual Rotary Clubs advance the Object of Rotary and the mission of The Rotary Foundation by providing leadership and resources to the clubs and individual Rotarians.

District 5340 exists solely to support the clubs

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Things that we need to do better

Initiative 1: Offer District Events that provide value to all Rotarians

- **Create events that promote fellowship**
 - *Insert opportunities to meet new people*
 - *Be mindful of time to socialize with friends*
 - *Find constructive ways to add meaningful side-by-side work*
- **Create events that compel people to attend**
 - *Find unique venues*
 - *Cut costs dramatically*
 - *Move events to different areas of the district*
 - *Have subjects and speakers that explain the greater Rotary and inspire action*
 - *Focus on newer Rotarians*
 - *Give clubs talking points in advance of what the event is and why members should attend*
 - *Share ideas throughout meeting*
 - *Have events that make people fall in love with Rotary and all the amazing things Rotarians do around the world*
- **Plan and deliver high value District Conferences**
 - *Provide interesting programs that are not repetitious*
 - *Schedule for a single day*
 - *Find innovative ways to keep costs low*
- **Create efficient Foundation Programs**
 - *Rethink purpose of Gala*
 - *Plan Foundation Seminar and Foundation Gala together*
- **Ensure attention grabbing District Councils**
 - *Make programs compelling, even to non-Rotarians*
 - *Vary the location, making the places interesting*
 - *Hold the cost down*
 - *Consider having clubs pay for attendees*
 - *Add opportunities for fellowship and inspiration*
 - *Have meaningful and entertaining content delivered with energy*
- **Redesign District Assembly for target audience(s)**
 - *Determine whom DA is targeting – new Rotarians, knowledgeable Rotarians, leadership, and be explicit in promoting DA*
 - *Create a training “track” for each club job*
 - *Add legislative session to District Assembly*

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Things that we need to do better

Initiative 2: Expand leadership development at all levels to fully use talents and skills of Rotarians

- *Prepare and train all club presidents*
 - *District should promote all incoming Presidents attending LDA*
 - *Define club leadership ladder– job description, available resources, experience and training for each major position*
 - *District needs to promote and train club presidents in RI Club Leadership Plan*
 - *All PEs attend pre-PETS in addition to PETS*
 - *Quarterly meetings of current Presidents led by AG, to discuss best practices and ideas for resolving club problems*
 - *Encourage PEs to visit other clubs for ideas*
 - *Teach leadership skills, especially running meetings, delegating, team building*
 - *Vary what recommend on leadership skills according to club size*
- *Train every AG and ensure each is involved*
 - *Job description and training for AGs*
 - *Have AG attend club board meeting*
 - *Have AG meet with all his/her Presidents quarterly for information exchange*
- *Open District staff positions and committees to all interested parties*
 - *More info on how to get involved with district events*
 - *Recruit district leaders through an open application process*
 - *Hold annual meeting on DG responsibilities for those interested in future*
 - *Define leadership ladder – brief job description, available resources, experience and training for each major position in district*
 - *Define ways to open up and draw more people into District roles*
 - *Ask presidents to recommend good candidates for district committees*
 - *Encourage AGs to watch for talent in the clubs*
- *Make leadership objectives consistent year to year*
 - *Annual strategic planning at District and club level*
 - *Offer club position training by “tracks” at DA & small group mentoring*
- *Make training readily accessible*
 - *Develop on-line LDA, so people can take any time, any where*
 - *Provide teleconference capability for meetings and training*
- *Assist clubs develop strong leadership at all levels*
 - *Assist clubs with succession planning*
 - *Provide club leadership tracks in District Assembly*
 - *Promote the new Leadership Plan organization for clubs*
 - *Suggest ways club president can determine who in club could/should be a leader*

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Things that we need to do better

Initiative 3: Enhance club capacity to recruit, retain and extend membership

- *Attract ethnic minorities*
 - *Recruit ethnic minorities, particularly Hispanics, so we become more reflective of our community*
 - *Form relationships with ethnic community leaders*
 - *Be able to articulate why Rotary would be good for the community*
- *Attract younger members*
- *Focus on gender balance by club*
- *Enhance efforts to share best practices in growing club membership*
 - *Continue membership newsletter*
 - *Develop Website with suggestions*
 - *Share what clubs have found to work*
 - *Develop a membership pitch*
 - *Develop ways to get members to bring guests*
 - *Create strategies for turning visitors into members, including an information packet and a visitor follow-up process*
- *Develop a strategy to reduce losses*
 - *Survey terminated members*
 - *Get new members involved quickly*
 - *Follow-up on absentees*
 - *Form a retention committee*
 - *Mentor new members*
- *Put Rotary into the public view*
 - *Create billboards*
 - *Purchase bus advertisements*
 - *Have recipients of projects issue press releases*
 - *Create a list of organizations impacted locally and globally by clubs in the district, and the impact of the projects, to use in public relations*
 - *Have clubs do publicity releases often*

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Things that we need to do better

Initiative 4: Promote cooperation among clubs to strengthen fellowship and service

- *Promote club successes*
- *Provide opportunities for inter-club fellowship*
 - *Encourage joint club meetings*
 - *More interaction between clubs aside from District events*
 - *Create a large international hands-on project for members of many clubs to travel and work together*
- *Create partnerships between and among clubs:*
 - *Strong club helping emerging club Partner on projects – community and international*
 - *Share fundraising success stories*
 - *Structure district events to promote interaction*
- *Assist Clubs with ideas for Fundraising*
 - *Ideas on best selling auction items*
 - *Ideas on types of fundraisers*
- *Team clubs for Rotarians at Work Day*
 - *Find ways for multiple clubs to work on a single project*
 - *Use QuickBits to disseminate information*
- *Enable clubs to work together on matching grants*
 - *Educate clubs on matching grant web sites*
 - *Use QuickBits for clubs searching for a project or a partner*
- *Find ways to cooperate and team with NGOs, and with other service clubs*

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Initiative 5: Provide clubs, members and potential members with accessible, relevant and timely information

- *Create an attractive, compelling and informative web page for potential members*
- *Create a website that is the primary reference for clubs seeking information*
 - *Include a “clickable” organization chart*
 - *Create a repository of best practices*
 - *Store forms on the website, easily accessible*
 - *Create links to other sources of information, including RI website*
- *Focus on easy access to information*
 - *Ensure “three clicks to anything”*
 - *Include a really good search function*
 - *Offer a program for a club’s meeting on what is available from the District website and the RI website*
- *Provide clubs with information on available administrative software with pros and cons of each.*
- *Create an online video library for clubs to use for programs or education*
- *Find ways to use social networks, YouTube, Facebook*
 - *Reallocate funds from other parts of District to fund this*
 - *Use volunteer talent from clubs, Rotaract, Interact, colleges*