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## STRATEGIC GOALS AND OBJECTIVES

2021-2024

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# STRATEGIC GOALS AND OBJECTIVES

## Strategic Goal 1 – Enhancing Participant Engagement

*Let's recommit to putting the needs, expectations, and growth of our participants at the center of all we do.*

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### SUMMARY OF OBJECTIVES

#### **Objective 1.1: Membership Growth**

Assist each club in the District to achieve a net average gain of one member per club in each Rotary year (measured at the District level).

#### **Objective 1.2: Establishing New Club**

Assist in establishing a new club (Satellite/Passport/e-Club/Rotaract) in partnership with community organizations.

#### **Objective 1.3: Membership Retention**

Assist each club in the District to achieve an average ninety-five (95%) Retention of members in each club in each of the next four years.

#### **Objective 1.4: Membership Engagement**

Encourage Clubs to achieve an average of seventy-five percent (75%) of members in each club to participate in club activities outside of meeting attendance and financial donations (i.e., service projects, leadership, committee membership, fundraising, attending district or international meetings, action groups, fellowships, etc.).

#### **Objective 1.5: Membership Engagement in the Rotary Foundation**

Encourage seventy-five percent (75%) of Clubs to establish Rotary Foundation and PolioPlus goals and assist them in developing and implementing a plan to achieve the goals that have been set.

#### **Objective 1.6: High Engagement Projects**

Encourage fifty percent (50%) of clubs to collaborate with one or more clubs on a common community project every Rotary year over a four-year period.

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### OBJECTIVE 1.1 MEMBERSHIP GROWTH

Assist each club in the District to achieve a net average gain of one member per club in each Rotary year (measured at the District level).

#### RESPONSIBILITY

Referred to: Membership Committee  
Point of Contact: Brittany Tomac  
District Leadership Liaison: Dave Anderson

#### SOME RECOMMENDED SUPPORTIVE ACTIVITIES

- a. Empower the Membership Team.
- b. Assist Membership Team develop a recruitment plan.
- c. Use RI resources: Emily Tucker & RI Referrals.

- d. Approach clubs with help in driving membership numbers.
- e. Targeted recruitment of members (e.g., Rotary Alumni).
- f. Need more young people in the Clubs. Do we know what they prefer and want?
- g. Diversify membership (demographics, ethnicity, gender).
- h. Explore New Generation Service Exchange to sow seeds for future Rotarians.
- i. Establish Rotaract and Interact clubs. Seek member assistance to recruit advisors.
- j. Find out what Interactors and Rotaractors prefer or want. (e.g., May not be Polio eradication).

## OBJECTIVE 1.2 ESTABLISHING NEW CLUB

Assist in establishing a new club (Satellite/Passport/e-Club/Rotaract) in partnership with community organizations.

### RESPONSIBILITY

Referred to: Membership Committee  
 Point of Contact: New Clubs Champion (TBD)  
 District Leadership Liaison: Dave Anderson

### SOME RECOMMENDED SUPPORTIVE ACTIVITIES

See above.

## OBJECTIVE 1.3 MEMBERSHIP RETENTION

Assist each club in the District to achieve an average ninety-five (95%) Retention of members in each club in each of the next four years.

### RESPONSIBILITY

Referred to: Membership Committee  
 Point of Contact: Brittany Tomac  
 District Leadership Liaison: Dave Anderson

### SOME RECOMMENDED SUPPORTIVE ACTIVITIES

- a. Establish protocol for a robust new members on-boarding process.
- b. Assign new member to a mentor.
- c. Better, prompt communication and prompt follow up needed to retain new members.
- d. Address needs of families with children and integrate them.
- e. Connect new members to projects of their passion, people and activities.
- f. Involve them to experience service activities.
- g. Targeted asks addressed to younger people not general announcements.
- h. More inter-Club collaboration around member retention.
- i. Keeping in touch with retired members (snowbirds).
- j. Provide training and ideas to Clubs on:
  - New member onboarding;
  - Socializing & Mentoring new members;
  - Inviting them to Board Meetings; and,
  - Best practices from Zone and RI through the District Membership Committee.

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## OBJECTIVE 1.4 MEMBERSHIP ENGAGEMENT

Encourage Clubs to achieve an average of seventy-five percent (75%) of members in each club to participate in club activities outside of meeting attendance and financial donations (i.e., service projects, leadership, committee membership, fundraising, attending district or international meetings, action groups, fellowships, etc.).

### RESPONSIBILITY

Referred to: Membership Committee  
Point of Contact: Brittany Tomac  
District Leadership Liaison: Dave Anderson

### SOME RECOMMENDED SUPPORTIVE ACTIVITIES

- a. Approach clubs with help in driving member engagement.
- b. Measure engagement.
- c. More doers, not just sign checks.
- d. More fun component to make it engaging.
- e. Welcome diverse, fresh, novel ideas, activities to replace habit & inertia.
- f. More innovative and novel programming and activities are needed.
- g. Promote less regimented programming.
- h. Create competition for ideas and engagement.
- i. Rewards for:
  - Contribution to RI Foundation;
  - Net retention; and,
  - Public Image initiatives.
- j. Inspire the base by sharing and showcasing projects with impact.
- k. District Training team planning First Thursday training events of 45 minutes, open to any member in the District: Topics will be a mix of education and networking.
- l. Partner with older members to open the club to innovation.
- m. Use Rotary Club Central/Spreadsheet to record activity with the assistance of administrative assistant or a tech-savvy member.

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## OBJECTIVE 1.5 MEMBERSHIP ENGAGEMENT IN THE ROTARY FOUNDATION

Encourage seventy-five percent (75%) of Clubs to establish Rotary Foundation and PolioPlus goals and assist them in developing and implementing a plan to achieve the goals that have been set.

### RESPONSIBILITY

Referred to: Foundation Committee  
Point of Contact: TBD  
District Leadership Liaison: Dave Anderson

### SOME RECOMMENDED SUPPORTIVE ACTIVITIES

See above.

## OBJECTIVE 1.6 HIGH ENGAGEMENT PROJECTS

Encourage fifty percent (50%) of clubs to collaborate with one or more clubs on a common community project every Rotary year over a four-year period.

### RESPONSIBILITY

Referred to: Grants Committee/District Project Fund Committee  
Point of Contact: Sally Davis/Nancy Lohberger  
District Leadership Liaison: Dave Anderson

### SOME RECOMMENDED SUPPORTIVE ACTIVITIES

- a. Inspire the base by sharing and showcasing projects with impact.
- b. Identify a signature project.
- c. Active involvement in Local projects (from check-writing to doing).
- d. Invest money and effort to more hands-on projects.
- e. More short term, tangible, demonstrable service projects.
- f. Projects in Thailand, Vietnam and Cambodia.
- g. Outreach in international projects should be more proactive.
- h. Launch Environment Committee in 2021.
- i. Inspire the base by sharing and showcasing projects with impact.
- j. Build connections with Rotary in other countries (e.g. Singapore, India etc.)
- k. Increase Foundation giving by inspiring pitch. Share stories, graphics, videos.
- l. More collaboration around grants.
- m. Joint programming among clubs.
- n. Have AGs play the role of facilitators of inter-club projects.
- o. Incentivize inter-Club collaboration through significant grant premium.

## Strategic Goal 2 – Increasing Impact

*Let's prove that our impact on the world has just begun.*

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### SUMMARY OF OBJECTIVES

#### **Objective 2.1: Changing the Culture**

Plan for two exploratory events each year, in addition to District Conference and routine training, that are Inter-Club, Inter-District or International in nature where multiples clubs come together to identify and plan for a global grant.

#### **Objective 2.2: Looking Beyond One's Club**

Promote Rotary showcase where people can access information about projects, presentations, and audio-visual recordings of events organized by other clubs in the District.

#### **Objective 2.3: Club and District Collaboration**

Organize at least two District-wide Presidents' meetings with the District Governor Line and Assistant Governors.

**Objective 2.4: Inter-Club Collaboration**

Encourage **every** Club to participate in at least one inter-club project per year (incentivize clubs to collaborate with each other).

**Objective 2.5: Support to Clubs**

Assistant Governors will meet with their area Presidents once per quarter to address: (a) What is important to them? (b) How can district help?

**Objective 2.6: Building Stronger Relationships**

Invite potential leaders and current club presidents to attend a board meeting so the members understand the bigger picture and they build stronger relationships.

**Objective 2.7: Succession Planning**

Develop a succession plan for *District Leadership Team* by December 31.

**Objective 2.8: District Leadership Training**

Conduct a District Leadership Training Program by June 30.

**Objective 2.9: District Leadership Seminars**

Encourage/Incentivize at least five to six District Committee Chairs to participate in District Leadership Seminars (now available online).

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**OBJECTIVE 2.1 CHANGING THE CULTURE**

Plan for two exploratory events each year, in addition to District Conference and routine training, that are Inter-Club, Inter-District or International in nature where multiples clubs come together to identify and plan for a global grant.

**RESPONSIBILITY**

Referred to:	Grants Committee/District Project Fund Committee
Point of Contact:	Sally Davis/Nancy Lohberger
District Leadership Liaison:	Sridhar Balakuntalam

**SOME RECOMMENDED SUPPORTIVE ACTIVITIES**

- a. Get Clubs to collaborate and develop district and global perspective.
- b. Incentivize inter-Club collaboration through significant grant premium.
- c. More global grants through inter-Club collaboration.
- d. ROTEX, RYE, RYLA, Rotaract, Interact, and Global Scholars.
- e. Exposure to Clubs from other parts of the country and the world.
- f. At least one inter-Club and Inter District, International programming per quarter.
- g. Use email/Facebook/website/Instagram/Zoom to reach intended audience.

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## OBJECTIVE 2.2 LOOKING BEYOND ONE'S CLUB

Promote Rotary showcase where people can access information about projects, presentations, and audio-visual recordings of events organized by other clubs in the District.

### RESPONSIBILITY

Referred to: Grants Committee/District Project Fund Committee  
Point of Contact: Sally Davis/Nancy Lohberger  
District Leadership Liaison: Sridhar Balakuntalam

### SOME RECOMMENDED SUPPORTIVE ACTIVITIES

See above.

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## OBJECTIVE 2.3 CLUB AND DISTRICT COLLABORATION

Organize at least two District-wide Presidents' meetings with the District Governor Line and Assistant Governors.

### RESPONSIBILITY

Referred to: District Governor Line/Assistant Governors  
Point of Contact: Lisa VanderKelen  
District Leadership Liaison: Sridhar Balakuntalam

### SOME RECOMMENDED SUPPORTIVE ACTIVITIES

- a. Get Clubs to collaborate and develop district and global perspective.
- b. Incentivize inter-club collaboration through significant grant premium.
- c. More global grants through inter-club collaboration.
- d. ROTEX, RYE, RYLA, Rotaract, Interact, and Global Scholars.
- e. Exposure to Clubs from other parts of the country and the world.
- f. At least one inter-club and inter-district, International programming per quarter.
- g. Use email/Facebook/website/Instagram/Zoom to reach intended audience.

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## OBJECTIVE 2.4 INTER-CLUB COLLABORATION

Encourage **every** Club to participate in at least one inter-club project per year (Incentivize clubs to collaborate with each other).

### RESPONSIBILITY

Referred to: Grants Committee/District Project Fund Committee  
Point of Contact: Sally Davis/Nancy Lohberger  
District Leadership Liaison: Sridhar Balakuntalam

### SOME RECOMMENDED SUPPORTIVE ACTIVITIES

See above

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## OBJECTIVE 2.5 SUPPORT TO CLUBS

Assistant Governors will meet with their area Presidents once per quarter to address: (a) What is important to them? (b) How can district help?

### RESPONSIBILITY

Referred to: Assistant Governors  
Point of Contact: Assistant Governors in Each Area  
District Leadership Liaison: Sridhar Balakuntalam

### SOME RECOMMENDED SUPPORTIVE ACTIVITIES

Regular, frequent, and prompt communication between DG-Line and Committee Chairs with Club leaders through personal visits, Zoom meetings.

- What is important to them? (2) How can district help? (3) Why do they stay?
- One-on-One Chats with PEs/PNs.
- Invite six to eight Club Presidents to each Board Meeting.
- Team development so all are involved.

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## OBJECTIVE 2.6 BUILDING STRONGER RELATIONSHIPS

Invite potential leaders and current club presidents to attend a board meeting so the members understand the bigger picture and they build stronger relationships.

### RESPONSIBILITY

Referred to: District Governor Line/Assistant Governors  
Point of Contact: Assistant Governors for Each Area  
District Leadership Liaison: Sridhar Balakuntalam

### SOME RECOMMENDED SUPPORTIVE ACTIVITIES

- a. Establish a systematic succession planning combined with leadership development of DLT and Club leaders.
- b. Use a nominating committee.
- c. Work on succession planning by keeping younger members, Past presidents and DGs in view.
- d. Work on succession planning by keeping younger members in view.
- e. Past presidents and PDGs are not sufficiently leveraged (provide specific role/project)
- f. We need to do a better job of onboarding Board members: What is the big picture? Who does what?
- g. Should introduce new leaders to the Clubs when they come aboard.
- h. Work on succession planning by keeping younger members in view.
- i. Encourage/Incentivize participation in District Leadership Seminars now available on line
- j. Encourage and recommend use of Learning Center at Rotary International Website.
- k. Provide a defined path of activities and positions to the District level.
- l. Pay attention to succession issues on college and school campuses
- a. Annual District Leadership Seminars

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## OBJECTIVE 2.7 SUCCESSION PLANNING

Develop a succession plan for *District Leadership Team* by December 31.



## RESPONSIBILITY

Referred to: District Leadership Line  
Point of Contact: Sridhar Balakuntalam  
District Leadership Liaison: Sridhar Balakuntalam

## SOME RECOMMENDED SUPPORTIVE ACTIVITIES

See above.

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## OBJECTIVE 2.8 DISTRICT LEADERSHIP TRAINING

Conduct a District Leadership Training Program for the District Leadership Team by June 30.

## RESPONSIBILITY

Referred to: Training Committee  
Point of Contact: Julia Wallace/Nancy Leipzig  
District Leadership Liaison: Sridhar Balakuntalam

## SOME RECOMMENDED SUPPORTIVE ACTIVITIES

See above.

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## OBJECTIVE 2.9 DISTRICT LEADERSHIP SEMINARS

Encourage/Incentivize at least five to six District Committee Chairs to participate in District Leadership Seminars (now available online).

## RESPONSIBILITY

Referred to: Training Committee  
Point of Contact: Julia Wallace/Nancy Leipzig  
District Leadership Liaison: Sridhar Balakuntalam

## SOME RECOMMENDED SUPPORTIVE ACTIVITIES

See above

## Strategic Goal 3 – Increase Our Ability to Adapt

*Let's stay true to ourselves and stay ahead of change in our next 115 years.*

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## SUMMARY OF OBJECTIVES

### **Objective 3.1: Leveraging Technology**

Organize at least two training sessions on using Zoom and Social Media.

### **Objective 3.2: Rotary International Learning Center**

Encourage and recommend use of Learning Center at RI Website.

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## OBJECTIVE 3.1 LEVERAGING TECHNOLOGY

Plan for two exploratory events each year, in addition to District Conference and routine training, that are Inter-Club, Inter-District or International in nature where multiples clubs come together to identify and plan for a global grant.

### RESPONSIBILITY

Referred to: Training Committee  
Point of Contact: Julia Wallace/Nancy Leipzig  
District Leadership Liaison: Scott Knaffla

### SOME RECOMMENDED SUPPORTIVE ACTIVITIES

- a. Harness technology to make it member-friendly and programs more accessible.
- b. Leverage the familiarity with Zoom experience.
- c. Increase the ability of our Clubs to employ technology to meet and to serve.
- d. Enlist Rotary Tech Buddies to assist members with access to meetings and programs.
- e. Being able to safely hold meetings/gather together.
- f. Leverage technology to enhance access and increase reach.
- g. More Social Media presence with more frequent updates is needed (Facebook, Instagram, Website etc.).
- h. Keep track of former RYE, RYLA, Rotaract, Interact, Global Scholars using technology.
- i. Make DACdb salient both at orientation and devote a part of program to educate the entire club.

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## OBJECTIVE 3.2 ROTARY INTERNATIONAL LEARNING CENTER

Encourage and recommend use of Learning Center at RI Website.

### RESPONSIBILITY

Referred to: Training Committee  
Point of Contact: Julia Wallace/Nancy Leipzig  
District Leadership Liaison: Scott Knaffla

### SOME RECOMMENDED SUPPORTIVE ACTIVITIES

See above

## Strategic Goal 4 – Expand Our Reach

*Let's prove that our impact on the world has just begun.*

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## SUMMARY OF OBJECTIVES

### **Objective 4.1: Increasing Public Awareness and Strengthening Public Image**

In each of the next four years, increase positive media reports and enterprise stories using various platforms by no less than fifteen percent (15%).

**Objective 4.2: Market Segmented Strategies**

Provide market segmented (e.g., youth, media persons, social media savvy etc.) communications to reach potential members and copy each club on a regular basis.

**Objective 4.3: Focused Recruitment and Engagement**

Encourage focused recruitment and engagement of communication/media professionals and opinion shapers by Clubs.

**Objective 4.2: Increasing Internal Awareness**

Within one year, we create a stand-alone email-based approach to target the district membership with a “Meet the DLT” and “District-Wide Opportunities” newsletter on a bimonthly basis.

**OBJECTIVE 4.1 INCREASING PUBLIC AWARENESS AND STRENGTHENING PUBLIC IMAGE**

In each of the next 4 years, increase positive media reports and enterprise stories using various platforms by no less than fifteen percent (15%).

**RESPONSIBILITY**

Referred to:	Public Image Committee
Point of Contact:	Denis Tan
District Leadership Liaison:	Scott Knaffla

**SOME RECOMMENDED SUPPORTIVE ACTIVITIES**

- a. Club leaders and Members not aware of what District does.
- b. Introduce every member of the DLT to Clubs with details of their background, role, and responsibilities.
- c. Increase Club and District leaders participation at the District conferences and meetings to create interest and involvement.
- d. Rotarians do not know what the RI Foundation does.
- e. Alert via text, FB, Instagram, etc.

**OBJECTIVE 4.2 MARKET SEGMENTED STRATEGIES**

Provide market segmented (e.g., youth, media persons, social media savvy etc.) communications to reach potential members and copy each club on a regular basis.

**RESPONSIBILITY**

Referred to:	Public Image Committee
Point of Contact:	Denis Tan
District Leadership Liaison:	Scott Knaffla

**SOME RECOMMENDED SUPPORTIVE ACTIVITIES**

See above.

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### **OBJECTIVE 4.3 FOCUSED RECRUITMENT AND ENGAGEMENT**

Encourage focused recruitment and engagement of communication/media professionals and opinion shapers by Clubs.

#### **RESPONSIBILITY**

Referred to: Public Image Committee  
Point of Contact: Denis Tan  
District Leadership Liaison: Scott Knaffla

#### **SOME RECOMMENDED SUPPORTIVE ACTIVITIES**

See above.

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### **OBJECTIVE 4.4 INCREASING INTERNAL AWARENESS**

Within one year, we create a stand-alone email-based approach to target the district membership with a “Meet the DLT” and “District-Wide Opportunities” newsletter on a bimonthly basis.

#### **RESPONSIBILITY**

Referred to: Public Image Committee  
Point of Contact: Denis Tan  
District Leadership Liaison: Scott Knaffla

#### **SOME RECOMMENDED SUPPORTIVE ACTIVITIES**

- a. Club leaders and Members not aware of what District does.
- b. Introduce every member of the DLT to Clubs with details of their background, roles and responsibilities.
- c. Increase Club and District leaders’ participation at District conferences and meetings to create interest and involvement
- d. Rotarians do not know what the RI Foundation does.
- e. Alert via text, FB, Instagram, etc.
- f. Could be a 2 min. video to give to clubs to intro the DLT.
- g. Monthly Rotary Theme basis to drive newsletter foci.
- h. An inverted pyramid with clubs responding to embedded surveys to get responses to the newsletter content.
- i. Ascertain members’ preferred mode of communication and dispatch accordingly.

## Conclusion

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### NEXT STEPS

1. Members of the District Governor Line and/or Assistant District Governors present strategic goals and objectives to Club Presidents and Presidents-Elect at area meetings.
2. The respective committees and groups to which each objective is assigned meet to develop an implementation plan for each objective informed by additional input from Club Presidents and Presidents-Elect.
3. District Leadership Team reviews and approves implementation plans.
4. Members of the District Governor Line, Assistant District Governors, and District Committee Chairs work with the District Committees and Club Presidents on goal implementation.
5. District Leadership Team monitors implementation progress through an implementation dashboard that is also available to Club Presidents and others.