



**District 6580 Strategic Plan**  
**from**  
**District 6580 Strategic Planning Meeting**

January 9, 2016

Vincennes, IN

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Key Initiatives and Timelines through December 31, 2017

Expand AG Responsibilities/ Develop AG Training	Activities	Timeline	Person(s) responsible	Next Steps
<b>Consider boosting spending limit for AG travel and additional training (e.g. PETS)</b>	Define metrics for measuring the success of the training, such as: number of AGs trained	2017-2018/2018-2019	District Leadership	Review plan for AG Training and roles Identify a trainer and develop training Consider an AG session at PETS  Review district budget for AG travel and training Review district bylaws for specifics on AG role
	Number attending District Conference Number of AGs attending PETS	2017-2019	District Leadership	
	Ask club presidents to rate or review their AGs	2017-2019	District Leadership	
	Utilize an accountability table for evaluating AGs, such as making the required number of club visits on a quarterly basis	2017-2019	District Leadership	
<b>Decide if/how DG message could be delivered by AG</b>	Discuss with District Leadership	2016-2017	District Leadership	TBD

**Facilitators' Notes:**

- Participants expressed a range of perspectives on this initiative, activities and action steps. This indicated that if the initiative is to succeed, more discussion and consensus is needed to move forward. Prior discussion around membership and strong clubs indicated that club leadership was not always exhibiting “strong club” behavior. It might be necessary to think through the implications of having club leaders evaluate AGs.
- “District leadership” is identified as responsible for this initiative. Throughout discussion, there was a lack of clarity as to which district roles constituted the “district leadership” assumed to be responsible for implementing activities.
- This initiative is still at the idea level. Specifics need to be determined to assess feasibility and benefits to clubs.



Increase Public Awareness of Rotary	Activities	Timeline	Person(s) responsible	Next Steps
<b>Create awareness of Rotary in all areas of the district</b>	Create a committee of 1 representative for each designated area of the district	7/1/2016	PR Chair	DGE appoints PR Chair Shannon O'Toole
	Encourage each club to appoint a PR chair	5/1/16 to 7/1/16	PR Chair, DG, and AGs	Send out communication to AGs and club presidents
	Develop and present a training webinar	9/1/2016	District PR Chair and committee	Develop material for webinar
	Create a mechanism to record all PR activity	9/1/2016	District PR Chair and committee	Develop first quarter of Rotary year?
	Develop a district PR Calendar	7/1/16	District PR Chair and committee	Committee meets quarterly

**Facilitators' Notes:**

- The regional rep model may be beneficial to the district. Since it is a new initiative, it will be important to develop specific metrics to measure the success of this initiative
- Activities and initial steps focus on the infrastructure elements, such as creating a committee and calendar. It will be beneficial to identify types of content that will be interesting and beneficial to both clubs and the public in the different regions of the district. One way to engage PR chairs in clubs is to use them to form a regional advisory committee for identifying potential topics and content for PR activity.
- Options for selecting regional reps could include past club presidents who have had successful years; PR chairs in clubs that have had active, measurable success in public image activities; or younger club members who can provide perspective on content and channels that appeal to young professionals
- Fleshing out this initiative will require defining a timeline and next steps for the committee and specific leaders in the district leadership



Club Visioning	Activities	Timeline	Person(s) responsible	Next Steps
<b>Define Engagement</b>	Engage with: trained facilitators, Visioning Chair, DG succession team, AG team	Before 7/1/16	Visioning Chair (Teresa Heidenrich) & Visioning Coordinator (Chad Clark)	Quarterly updates
<b>Assure that 30-50% of clubs participate in club visioning</b>	Set a date for training visioning trainers	March 19, 2016	Teresa Heidenrich	District Coordinator Recruited: Chad Clark
	Conduct a visioning session with 4 clubs	June 30, 2016	Teresa & Chad	Contact clubs & put Visioning information on website
	Conduct a visioning session with 12 clubs	June 30, 2017	Teresa & Chad	Continuous promotion & education
<b>Recruit and train team</b>	Recruit 20-24 people regionally	March/2016	Leadership Team	completed ✓ 😊
	Develop 4-person, regional teams	Ongoing	Teresa & Chad	Develop strong lead facilitators
<b>Prioritize clubs for training</b>	Assess strength and needs of clubs	ongoing	Visioning Committee & DG	Quarterly review
<b>Determine Metrics</b>	Increase in membership Increase in club involvement More Foundation giving 30% of clubs processed 20-24 trainers trained	TBD	TBD	TBD

**Facilitators' Notes:**

- Developing criteria for the selection of trainers to be trained will be an important element in recruiting a team. Participants spent significant time discussing whether specific district roles, such as AGs, would be expected to be trained, which generated initial discussion of the possible traits of a trainer to be trained. Clarifying these criteria is an important next step.
- Fleshing out this initiative will also require defining timelines, persons responsible and next steps for the activities identified.
- The metrics for the initiative in terms of number of clubs to be trained are specific. An increase in membership from the visioning process alone may need to be supported by putting a specific membership team and plan in place at the district level. Along with visioning, clubs will need membership resources and tools such as The Membership Growth Opportunities materials, available on the Zones 30 and 31 website, <http://www.rizones30-31.org/resources/rrc/>

The district membership team should also consider resources such as the Zone Membership Coordinator and Assistant Coordinator assigned to D6580.

Training	Activities	Timeline	Person(s) responsible	Next Steps
<b>Train all clubs on Rotary fundamentals</b>	Develop Curriculum	Ongoing 2016-17	District Trainer PDG Shari Sherman & regional trainers	Get buy-in from Governor's team Identify the training staff
	Train AGs to deliver club training/club programs	3/17	Trainer & team	Schedule AG training at LOL PETS or 1-2 day training for AGs
	Communicate with club leaders about the district assistance/training	7/1/16 monthly	Trainer & DG	Define the communications to club leaders – the opportunity and the expectations
	Engage: club presidents/leaders, AGs, District succession team, District training team	3/17	Trainer & DG & DGE	Communications
<b>Provide club training to engage members</b>	Develop Global Grants Webinar	12/16	Foundation Chair & Foundation Team	Qualify clubs in a more convenient & effective manner
	Develop Membership Webinar	12/16	Membership Chair & Team	Educate clubs in a more convenient & effective manner
	Continue District Grant Webinar	12/16	District Grants Chair & Foundation Team	Engage Rotarians in Rotary Foundation
Develop Metrics	100% of clubs receive Rotary fundamentals	December 31, 2017		Identify quarterly topics, such as: Foundation, Membership, DaCdb/My Rotary/district website, Youth Service

**Facilitators' Notes:**

- Reinforcing and promoting this initiative to clubs can be done through many channels, including the Governor's address, district newsletter and website
- One option for this initiative is to pilot the project with 1-2 clubs in each region, so that the clubs can provide feedback to the training team before an all-district rollout
- In place of developing a curriculum from scratch, using RI and TRF materials is recommended. For example, materials for a club program/training on Membership can be done using materials such as The Membership Growth Opportunities materials, available on the Zones 30 and 31 website, <http://www.rizones30-31.org/resources/rrc/> and consulting with the Zones 30 and 31 Membership coordinators and assistants and Regional Foundation Coordinators and Assistants, who are also listed on the zones 30 and 31 website.

### What Did We Plan to Do?

- Expand AG Responsibilities/ Develop AG Training
- Increase Public Awareness of Rotary
- Assure that 30-50% of clubs participate in club visioning
- Train al clubs on Rotary fundamentals

### What Went Wrong?

- Not staying focused
- Putting the plan in a drawer and ignoring it
- Not making adjustments to the plan when needed
- We didn't get the right people to commit
- Not reviewing every few months
- Being afraid to take someone out of a role when they don't deliver

### Not Assigning/Having a Champion



December 31, 2017

### Common Themes/Areas for Action

- Developing Leaders
- Awareness of Rotary activity in community
- Club Visioning
- Education and Training (members, clubs, district teams)
- Collaboration/communication
- Strengthening Clubs/Membership Growth
- Underutilized district resources

### How Can We Manage the Risks?

- Have a calendar with our timelines defined
- Publish the plan on the website where it is prominent and visible
- Make sure that the plan is always on the agenda for district leadership meetings
- Attach the plan when distributing related documents
- Assign specific roles and interim timelines/due dates
- Add assigning a champion to next steps

Rotary



## Leadership

### Participants Were Engaged and Genuinely Committed to Rotary

The Rotary leaders who participated in this session seemed genuinely concerned about the clubs in the district, and were very engaged in discussions as to how to move clubs and the district forward in several key areas. Many traveled a considerable distance to participate. These leaders clearly care about the district, yet seemed hesitant to take action in some areas.

Two clarifications that would be helpful to define are:

#### Who is the "District Leadership?"

During the session, the participants often referred and deferred to "district leadership." For example, next steps for the initiatives referred to the "district leadership" making the decision, or needing to have buy-in. When facilitators asked who the "district leadership" was, answers were varied as to whom was responsible, had the authority or was accountable for certain decisions.

#### Who is the Plan "Champion?"

Commitment to the planning process was discussed at length, as well as the need for a champion to keep the plan visible and relevant. The DGE committed to be the champion through June 30, 2016. She asked for a champion to shepherd the plan in 2016-2017; no one stepped up, and the groups discussed the DGN as a possible champion. A PDG would be a good choice for this type of initiative, and several participated. It may be useful for the DGN and DGE to discuss the champion role individually with one or more of the PDGs that participated.



## Membership

### Participants Were Concerned about Membership

All of the participants were concerned about the district's membership. Numbers are currently declining, and 2 clubs are at risk.

During discussion, 56% of the initiatives identified by participants involved membership. Dot voting revealed support for one of those initiatives – club visioning.

Club visioning, as demonstrated by the Vincennes club's experience, can be a powerful tool for helping clubs to re-energize their members, but it needs to be supported by a strong commitment to club growth by district leadership. This leadership needs to be visible and active as a membership and extension team.

Three actions that could/should be initiated are:

**Identify and appoint regional district membership leads** to provide resources and encouragement to clubs and work as a team with the Membership Chair

**Set target ranges for increased membership** by June 30, 2016, December 31, 2016 and June 30, 2017

**Create an Extension Committee/team** to identify potential sponsor clubs, locations and formats for new clubs, and help clubs start satellite clubs that may evolve into new clubs.

The Zone Rotary Coordinator and team can assist with these efforts. The Membership Growth Opportunities materials, available on the Zones 30 and 31 website, <http://www.rizones30-31.org/resources/rrc/> are also a resource.