

# ROTARY DISTRICT 6860 STRATEGIC PLAN

---

8th Edition 2019-2022

**Rotary**



# ROTARY DISTRICT 6860 STRATEGIC PLAN

## Current as of July 1, 2019

### 1. MISSION:

The mission of Rotary International District 6860 is to provide leadership through service to all Rotary Clubs in the District, and to coordinate activities, encourage participation in local community service projects, Rotary International Programs, support for the Rotary Foundation, and provide training and development for all District 6860 Clubs.

### 2. VISION:

To be recognized locally and globally as a Premier Rotary District through the strength of our clubs.

### 3. CORE VALUES:

*Service	*Fellowship	*Diversity
*Integrity	*Public Relations	*Leadership Development
*Membership		

### 4. STAKE HOLDERS:

*District Rotarians	*Rotary International	*The Rotary Foundation	*Service Program
Beneficiaries	*Communities	*District Leaders	*Club Leaders
Districts and Clubs	*Partner		

### 5. KEY CUSTOMERS:

\* Local Club Leadership \*Assistant Governors \*District Leadership Team \*Training Team

### 6. INTRODUCTION TO DISTRICT GOALS, STRATEGIES, AND TACTICS:

#### A. Update the District 6860 Strategic Plan.

- The District Plan is structured into an overarching Strategic Plan with year to year continuing goals and three appendices representing the annual objectives planned for the current and following two Rotary Years.
- The 3-Year Strategic Plan should be reviewed and updated annually.
- The District Governor-Elect will lead this review and update each year.
- This annual update will also include addition of the new 3rd year of the plan.
- Use the Strategic Planning Process to provide continuity in Rotary Programs and Projects from year to year.
- The District Plan supports Club level Strategic Planning.
- The DGE will present the updated Strategic Plan at the Winter District Leadership meeting in preparation for formal distribution at Mid-south PETS and at District Assembly. Any updates needed based on the International Assembly themes and goals will be included prior to Mid-South PETS.

## **B. References.**

- **Rotary International Strategic Plan and Progress Report**  
<https://www.rotary.org/myrotary/en/learning-reference/about-rotary/strategic-plan>  
<https://www.rotary.org/myrotary/en/document/strategic-plan-progress-report>
- **Rotary International Strategic Planning Guide-**  
[http://www.rotary.org/RIdocuments/en\\_doc/strategic\\_planning\\_guide\\_en.doc](http://www.rotary.org/RIdocuments/en_doc/strategic_planning_guide_en.doc)
- **Ba A Vibrant Club....pamphlet**  
<https://www.rotary.org/myrotary/en/document/556>
- **Be A Vibrant Club....Club Leadership Plan Worksheet**  
<https://www.rotary.org/myrotary/en/document/617>

## **C. Leadership.**

- The District Rotary Leadership Institute (RLI) Program prepares Rotarians for District and Club leadership positions. (See District Leadership Plan (DLP)).
  - District Leaders, including the DGE, and DGN and all Committee Chairs are encouraged to become RLI Graduates.
  - Assistant Governors should complete RLI during their first year of service or earlier. All newly appointed AG's are encouraged to complete RLI before assuming their AG duties.
  - District Clubs should plan for their Club President-Elect and Club President-Nominee, to complete RLI before assuming duties.
- Encourage all Clubs to support an Interact/Rotaract Club in their area and send two students annually to the Rotary Youth Leadership Awards (RYLA) Camp.
- Update the District Leadership Plan (DLP) annually to be consistent with RI Bylaws and current operating practices.
- Develop a plan for improving attendance at District Conference and District Assembly.
- Develop and implement a Pre-PETS Orientation program.

## **D. Support the Rotary Foundation.**

- Achieve participation by 100% of district's clubs to support/contribute to the Rotary Foundation annually.
- Increase the number of clubs annually that earn the EREY Award.
- Grow the total giving to the Annual Program Fund each Rotary year. The Zone 30/31 Director has set the goal of \$100 per capita giving to The Rotary Foundation.
- Promote the Paul Harris Society and increase membership by 10 members annually.
- Encourage all clubs to plan a quarterly Foundation focused program to emphasize the value and benefits of the Rotary Foundation.

## **E. End Polio Now.**

- Polio is very close to being eradicated worldwide. This is Rotary Internationals Number 1 priority for 2018-2021. We must complete the Eradication of Polio as Rotary's gift to the children of the world.
- A District Wide Fund Drive to support End Polio Now is under development

#### **F. Increase Club Membership (Vibrancy).**

- Focus on the club member Rotarian as the primary club “customers.”
- Meet annual 2.5% membership growth goal set by the Rotary Zones 30-31.
- Work to retain 95% of current members annually.
- Promote diversity in Club membership to reflect a cross-section of the community.
- Increase member participation in service projects and activities.
- Seek ideas for involvement and improvement from membership.
- Establish and support Satellite Clubs, alternate schedules, meeting locations, and alternate fee arrangements.

#### **G. Strategic Plans for all Clubs**

- Each club is highly encouraged to develop a strategic plan that provides future direction for the club.
- Clubs should provide their 3-year Strategic Plan to the District Governor and Assistant Governor.
- The District Governor will discuss Strategic Planning and the Club Assistance Program with the President and Board of Directors during the regular Club visits.
- Provide a Strategic Planning Model and/or personnel support as needed.
- Develop a web-based District 6860 Club Self-Assessment Tool for use by Club Presidents and Presidents-Elect to assess Clubs strengths and weaknesses.
- Club President-Elects complete a club assessment as part of their PETS preparation (possible during pre-PETS seminars), and develop an action plan for implementation during their Club Presidential year.
  - Assess District-wide club trends, and develop plans to strengthen Clubs as needed.
  - Provide feedback to Club President and District Governor/Staff.
  - Offer Club Presidents assistance from their Assistant Governor, and /or District Staff.

#### **H. Focus and Increase Humanitarian Service.**

- Review Rotary International programs and establish a District 6860 community assessment model for use by Clubs.
- Ensure Clubs know how to use Community Assessments to support their planning process by developing a tutorial to show clubs how to perform community assessments and to translate the results into action.
- Encourage club representatives to report club’s community and international projects on Rotary Showcase in My Rotary and search for potential projects/partnerships for their clubs in Rotary Ideas in My Rotary.
- Ensure Clubs know how to apply for District Grants online in the District and Club Database (DaCdb) program and apply for Global Grants online in My Rotary.
- Encourage Club participation in one or more local and/or international projects annually.
- Strive to involve all club members in one or more service projects and/or activities annually.
- Increase sustainable service focused on
  - The Rotary Foundation's Six Areas of Focus
    - Peace and conflict prevention/resolution

- Disease prevention and treatment
- Water and sanitation
- Maternal and child health
- Basic education and literacy
- Economic and community development
- Clubs must use Rotary Club Central (RCC) to record their Service goals and to track performance.
- The District Governor will recognize Clubs during District Conference for planning and executing outstanding projects both in the Community and Internationally.

#### **I. Enhance Public Image and Awareness.**

- Develop a Communication/Public Relations plan to unify image and improve the public’s awareness of the Rotary brand.
- Establish the capability of streaming video of the major speakers at District Training Assembly and at the District Conference.
- Encourage Clubs to publicize local Rotary Projects and Programs, both prior to and immediately after the event occurs.
- Use Rotary International's Brand Center guidelines and video advertisements as Public Service announcements and publicize locally the Rotary Goal of eliminating Polio from the world!
- Involve Rotarians in partnering with other Community Service programs.
- Involve Rotaractors, Interactors, Youth Exchange students, and RYLA students in District Programs and Projects.

#### **J. Administration.**

- Use the District and Club Database (DaCdb) to integrate sound practice and internal communications that support the orderly and consistent methods of our work.
- Encourage clubs to implement “best practices” in management of club resources and activities.
- Issue the annual District Directory by July 1 each year including an electronic directory.
- Publish and distribute a monthly electronic District Governor’s Newsletter.
- Develop and implement an annual Customer Satisfaction Survey for clubs to provide customer feedback to the District Governor.
- Develop and maintain DaCdb Dashboard indicators to reflect the progress of district work.
- Revise district policies and ensure they are incorporated into the updated District Leadership Plan.

### **3. APPENDICES:**

Appendices are added to the plan each year to provide continuity for the multi-year District Goals and Projects, such as the Rotary Leadership Institute initiative, as well as for goals that continue from year to year, such as Membership and Foundation Giving.

- A. Appendix A - Rotary Year 2019-2020 – DG Bill Petty**
- B. Appendix B - Rotary Year 2020-2021 - DG Lee Weinman**
- C. Appendix C - Rotary Year 2021-2022 - DG Harold W. Lewis**

## **Appendix A - Rotary Year 2019-2020 Goals**

### **District Governor Bill Petty**

#### **A. Support and Strengthen Clubs**

##### **1. Strategic Planning**

- Ensure that the District 6860 Strategic Plan is updated to reflect new Rotary International goals and objectives along with DG's specific goals for the year.
- Every club will be encouraged to develop/maintain a Strategic Plan that supports club direction and member participation
- Provide feedback and input to the annual update

##### **2. Develop Training Teams in Visioning and Membership to Assist Clubs**

- Ensure that Training Teams are fully operational to serve clubs with visioning and membership plans
- Ensure that a Club Assessment tool have been developed and distributed to Presidents Elect and Assistant Governors for use by clubs to determine strengths and weaknesses as a part of the visioning/membership planning process

#### **B. Ensure and Increase Participation in Club and Humanitarian Service**

- Support efforts to ensure the Eradication of Polio as Rotary's gift to the children of the world
- Every club participates in multiple service projects (local and/or international) and provides information on their projects to include in the DGs newsletters and at District Conference
- Develop and maintain a database at the district level to list international humanitarian projects in our district so that clubs can know what other clubs are doing, and have an opportunity to work together on implementing and financing global grant projects
- Clubs involve youth in their service projects (Interact, Rotaract, Scout Groups, etc)
- Continue to improve the timeliness of updates in DaCdb by the district and clubs to support club leadership assignments, district leadership assignments and events
- Encourage every club in the district to participate in Boilin' and Braggin' to support of Critical Care Transport of Children's of Alabama
- Encourage every club in the district to send one or more students to RYLA
- Challenge every club in the district to send one or more club officers or directors to District Training Assembly and the District Conference
- Goal of 75 Participants at the International Conference in Hawaii June 6-10, 2020

### C. Increase Club Membership

- Meet annual membership growth goal set by Rotary Zones 30-31 (2.5% increase)
- Promote diversity and ensure that Club membership reflects a cross section of the community
- Have district membership committee provide support to every club in the district on ways to retain members. Goal of 90 percent retention of membership district-wide
- Encourage formation of satellite clubs, sunset clubs and other alternative models for clubs to encourage diversity and membership growth
- Encourage the District Membership Committee to work collaboratively to support clubs setting up satellite clubs and recruiting/retaining members in new clubs

### D. Leadership Development

- Encourage every club in the district to send at least one Rotarian from their club through the Rotary Leadership Institute program annually
- Encourage RLI alumni to become actively involved in club and district leadership
- Encourage Rotarian participation at the District level
- Encourage all clubs to support an Interact or Rotaract club in their area.

### E. Support The Rotary Foundation

- Support Every Rotarian Every Year throughout the district with 100 percent giving at some level to the Annual Fund of The Rotary Foundation
- Promote the Paul Harris Society with a goal of five new members
- Encourage every club to include at least one program on The Rotary Foundation during the month of November (Foundation Month)
- Identify at least one new benefactor and five new major donors
- Increase giving to The Annual Fund/SHARE by 10 percent over the previous year
- Encourage clubs members to attend the annual District Foundation dinner. Goal to have at least 40 clubs represented at the dinner
- Provide training for clubs on various TRF topics including: Rotary Foundation Basics: What is Your Rotary Foundation? ; Grant Management Seminars; Club Qualification for District Grants; How to Apply for a Global Grant; Why Contribute to The Rotary Foundation? How to Nominate Someone for the Peace Fellows Program



## **Appendix B - Rotary Year 2020-2021 Goals**

### **District Governor Lee Weinman**

#### **A. Support and Strengthen Clubs**

- Ensure that the District 6860 Strategic Plan is updated to reflect new Rotary International goals and objectives along with DG's specific goals for the year.

#### **B. Increase Rotary's Presence in the Community**

- Grow Rotary through new member recruitment and existing member retention.
- Start two new evening or satellite clubs.

#### **C. Support The Rotary Foundation**

- Increase Rotary Foundation giving in all clubs.
- Have no club with zero giving to The Rotary Foundation.
- Ask all clubs to have at least one member attend the district's Foundation dinner.
- Increase active membership in the Paul Harris Society.

#### **D. Enhance Public Image and Awareness**

- Provide district support to encourage clubs using social media to disseminate information on club projects and events.
- Develop, implement, and fund a district imaging plan.

#### **E. Administration**

- Increase Clubs' use of Rotary Club Central.
- Effectively use Assistant District Governors to increase interaction with the clubs.
- Ensure that the Visioning goals set in 2019 are implemented.
- Revise district policies and ensure they are incorporated into the District Leadership Plan

## **Appendix C - Rotary Year 2021-2022 Goals**

### **District Governor Harold W. Lewis**

#### **A. Support and Strengthen Clubs**

- Ensure that the District 6860 Strategic Plan is updated to reflect new Rotary International goals and objectives along with DG's specific goals for the year.
- Every club will be encouraged to develop/maintain a Strategic Plan that supports club direction and member participation
- Provide feedback and input to the annual update
- Ensure that Visioning Teams are fully operational to serve clubs
- Ensure that proper tools are distributed to Presidents Elect and Assistant Governors for use by their clubs to determine strengths and weaknesses as a part of the visioning/strategic planning process
- Meet annual membership growth goal set by Rotary Zones 30-31
- Promote diversity and ensure that Club membership reflects a cross section of the community
- Have district membership committee provide support to every club in the district on ways to retain members. Aim for 90 percent retention of membership district-wide
- Review demographics in Northern Alabama to determine where clubs are needed and encourage formation of satellite clubs, sunset clubs and other alternative models for clubs to encourage diversity and membership growth

#### **B. Ensure and Increase Participation in Club and Humanitarian Service**

- Support efforts to ensure the Eradication of Polio as Rotary's gift to the children of the world
- Promote club participation in service projects (local and/or international); DDF or Global
- Encourage every club in the district to participate in some way in District Projects (Boilin n Braggin or other)
- Work with ADGs to
  - Encourage every club in the district to send one or more students to RYLA
  - Challenge every club in the district to send one or more club officers or directors to District Training Assembly

#### **C. Leadership Development**

- Encourage every club in the district to send at least one Rotarian from their club through RLI (Rotary Leadership Institute) program annually
- Encourage RLI alumni to become actively involved in club and district leadership
- Develop and implement Pre-PETS training for incoming Club presidents
- Encourage Rotarian participation at the District level

- Encourage all clubs to support an Interact or Rotaract club in their area.

#### **D. Support The Rotary Foundation**

- Support Every Rotarian Every Year throughout the district with 100 percent giving at some level to the Annual Fund of The Rotary Foundation
- Promote the Paul Harris Society with a goal of five new members
- Encourage every club to include at least one program on The Rotary Foundation during the month of November (Foundation Month)
- Increase giving to The Annual Fund/SHARE by 10 percent over the previous year
- Encourage club members to attend the annual District Foundation dinner. Goal to have at least 40 clubs represented at the dinner
- Provide seminars/webinars for clubs on various TRF topics including: Rotary Foundation Basics: What is Your Rotary Foundation?; Grant Management Seminars; Club Qualification for District Grants; How to Apply for a Global Grant; Why Contribute to The Rotary Foundation? How to Nominate Someone for the Peace Fellows Program

#### **E. Enhance Public Image and Awareness**

- Encourage clubs to use social media to disseminate information on club projects and events.
- Actively post information on District Programs and Projects on club and district website, Facebook, Twitter, etc. Utilize #Rotary Alabama
- Promote core values and emphasize vocational service in the club and the community
- Promote attendance at District, Zone and International Assemblies

#### **F. Administration**

- Support revision of District Leadership Plan and district policies as needed
- Clubs report goals and their progress in Rotary Club Central
- Increase use of District Website, DaCdb, and Rotary Club Central
- Provide training for use of DaCdb grants module and ensure that the district and clubs applying for Foundation grants meet qualification requirements
- Issue District Directory of July 1 electronically
- Use DaCdb to integrate sound practice and internal communications that support the orderly and consistent methods of our work
- Publish a monthly electronic District Governor newsletter
- Revise district policies and ensure they are incorporated into the District Leadership Plan