



ROTARY DISTRICT 5150

Strategic Plan 2023-2025

March 10, 2023



STRATEGIC PLAN 2023-2028

BACKGROUND:

Rotary District 5150, our members, and our leaders, believe that every organization requires a periodic review of where that organization is and where that organization needs to be in the next 5 years.

That process has led to seven teams of Rotarians, who have studied, shared, learned, and developed ideas for our future as a vibrant, robust, and growing group of Rotarians.

We are at this point 44 clubs, comprised of roughly 1,625 members in 3 counties (San Mateo, San Francisco, and Marin) with the constant desire to put Service Above Self.

As Rotarians we believe that:

TOGETHER, WE SEE A WORLD
WHERE **PEOPLE** UNITE AND TAKE ACTION
TO **CREATE** LASTING
CHANGE — ACROSS THE GLOBE,
IN OUR COMMUNITIES, AND IN OURSELVES.

Our Core Values haven't changed, but our world has. Technology, demographics, environmental challenges – the list of changes since our founding in 1905, has presented new opportunities. However, realizing these new opportunities will only happen if we are willing to understand them, accept them and use them to lead us forward.

FINDINGS:

Seven teams and over 60 participants were involved in this effort. As such, it is impossible to summarize all the great suggestions made. All group reports and all recommendations will be shared as appendices of this plan.

The intended use of these findings is to provide a roadmap for District Governors and their District Leadership Team, in creating actionable items for their year in furtherance of the Strategic Plan.

The Action Plan for our District is to be developed by the DLT, including the various standing committees. This is a work in progress, dynamic and intended to change with the District and our Rotarians' needs and desires. This work is an overall direction, with specific recommendations that need to be developed for actual implementation.

We believe that Rotary International's Action Plan provides the best vehicle for structuring the committee's output and providing District 5150 a path forward. As such, all the ideas from our various teams have been viewed through the lens of Rotary's Strategic Priorities and Objectives:

ROTARY'S STRATEGIC PRIORITIES AND OBJECTIVES

INCREASE OUR IMPACT	EXPAND OUR REACH	ENHANCE PARTICIPANT ENGAGEMENT	INCREASE OUR ABILITY TO ADAPT
<ul style="list-style-type: none">• Eradicate polio and leverage the legacy• Focus our programs and offerings• Improve our ability to achieve and measure impact	<ul style="list-style-type: none">• Grow and diversify our membership and participation• Create new channels into Rotary• Increase Rotary's openness and appeal• Build awareness of our impact and brand	<ul style="list-style-type: none">• Support clubs to better engage their members• Develop a participant-centered approach to deliver value• Offer new opportunities for personal and professional connection• Provide leadership development and skills training	<ul style="list-style-type: none">• Build a culture of research, innovation, and willingness to take risks• Streamline governance, structure, and processes• Review governance to foster more diverse perspectives in decision-making

There were several common themes worth noting in all the reports:

- A great deal of importance should be placed on how the District communicates with Club Leadership and members.
- Importance was placed on increasing all levels and types of support to The Rotary Foundation.
- Membership efforts must be strengthened, specifically in adding new Rotary and Rotaract Clubs.
- Diversity, Equity, and Inclusion are seen as vital to our journey, vital to our reach, vital to membership and growth.
- Learning and Development for our members is a focus: The more we know the more capable we are to serve.
- The environment as a focus for our service projects.
- Increased collaboration between clubs, between committees and between members.
- Communication, from District to Clubs, Club Leadership and members, including through our website, was seen as critical.

STRATEGIES TO INCREASE OUR IMPACT

- 1) The District will foster communication and collaboration between the various Committees. All our Committees will be encouraged to communicate with each other to foster better communication and project success throughout the District.
- 2) The District will encourage Club Service Projects to be focused on the environment.
 - The District will continue the multi-county Day of Service with the environmental focus.
 - Clubs will be encouraged to partner and collaborate with other clubs and/or groups to conduct their own environmentally focused projects.
- 3) The District will make a major outreach to increase youth involvement through collaboration with primary, secondary and colleges/universities located within the district.

- 4) The District will produce marketing and social media messaging that highlight our Youth Service activities within the Clubs.
- 5) The District will foster acceptance and usage of approved Rotary Master Branding and Mark of Excellence and will assist Clubs as they retire obsolete imaging/branding, specifically including outdoor highway and street Rotary signs.
- 6) The District Leadership will analyze Club Excellence Award submissions on a year-to-year basis to determine trends and provide direction to Clubs and District Leadership accordingly. The intent is that the Club Excellence Awards be dynamic, with criteria subject to change as we learn from our results.
- 7) The District will encourage additional clubs to participate in Global Grants and District Grants, to include the Global Grant Scholarships program.

STRATEGIES TO EXPAND OUR REACH

- 1) The District will start one new Rotary Club every year.
- 2) The District will encourage our Clubs to financially support our existing Rotaract Clubs and encourage the formation of one new Rotaract Club every year, either by themselves or with Rotary Club sponsorship and support.
- 3) The District will lead Club efforts to increase membership by 5% per year.
- 4) The District will increase our ratio of women to men from 40% to equal, without diminishing total membership.
- 5) The District will increase members of color from 49% overall to better reflect the counties in our district Marin (30%), San Francisco (63%) and San Mateo (62%) without diminishing total membership.
- 6) The District will encourage clubs to increase utilization of Corporate and Family Memberships.

- 7) The District will encourage clubs to increase the use of Honorary Members with a growth of two Honorary Members per club per year.
- 8) The District will continue the active participation with the current 3-District Multi-Media Campaign (www.norcalrotary.org) if it is determined that the effort and cost is effective. This is an immediate project and process that is now in active creation.
- 9) The District will support efforts to develop a relationship with at least one newspaper in each County.
- 10) Clubs will be encouraged to collaborate with organizations outside of Rotary for funding and collaboration on projects.
- 11) The District will encourage all Clubs to start or renew a Youth Service Project that includes a new or existing Interact Club.
- 12) The District will encourage Clubs to start EarlyAct (elementary age Interact) in schools within their reach.
- 13) District and Club Leadership will be encouraged to take Learning Center courses on DEI on an annual basis and make DEI a part of our membership efforts.
- 14) The District will utilize our website to develop a page on Club Content. Included can be types of speakers, where to find speakers, Foundation Moments, Vocational highlights of members, Thought of the Day – anything that helps to create actual meeting content.

STRATEGIES TO ENGAGE OUR MEMBERS

- 1) The District will develop a committee to review, update and monitor our D5150 website to become the focal point for all things Rotary in our District. This effort will include information about The Rotary Foundation and all of the various programs involved, Disaster Response information of all types and Youth Service Activities within the Clubs.
- 2) The District will continue the existing Diversity Equity and Inclusion (DEI) committee and new members will be encouraged to join.
 - The DEI Committee will become a formal part of the District Leadership and the necessary policy changes needed to be made in the Policy Manual. This will include formal member slots, staggered terms and specific targets for success.
 - The District will add DEI-related holidays to the Website and Website calendars.
- 3) The District will increase the number of The Rotary Foundation donors who become Major Donors, Major Gifts donors, Bequest Society Members, Endowment Fund donors, Giving Members and Arch Klumph Society Members.
- 4) The District will increase the number of Rotarian donors who become members of Every Rotarian Every Year, Paul Harris Society, Rotary Direct, PolioPlus Society, and donors to Disaster Response Funding.
- 5) The District will decrease usage of acronyms – or - increase knowledge of the basis for the acronyms.
- 6) The District will increase the number and topics of Learning and Development Sessions to include:
 - IT
 - Environmental topics
 - Diversity Equity & Inclusion
 - Fundraising
 - Three Essential Elements: Membership, Foundation (including the Peace Fellow Program) and Brand (Public Image/Public Relations).

- 7) The District will increase the Membership Committee with Ambassadors in each county to help individual clubs with member retention through increased member engagement.
- 8) The District will add a Youth Services annual summit through our Learning and Development Committee, with the goal of bringing all elements of Youth Service in the District together with Club Champions for Youth Service.
- 9) The District will share information about Youth Protection through the website and through the District Governor's messaging. The District will, on an annual basis, remind members of the requirements for Youth Protection, and the 5-year renewal requirement will be promulgated.
- 10) The District will develop a Small Club Ambassador whose expertise will be utilized in assisting clubs with limited membership.
- 11) The District will foster county-wide social events for members and prospective members to meet and enjoy what Rotary offers. BBQ's, Shredding Days, Earth Day.
- 12) The District will encourage Clubs to participate in Diversity, Equity and Inclusion Club initiatives.
- 13) The District will develop Potential Rotary Leader Seminar (PRLS) to be completed within the Rotary year.
 - Clubs will be encouraged to continue sponsoring the cost of PRLS.
 - President-elects and President-nominees will attend PRLS for free.
 - PRLS pre-requisites (Basic PRLS) will be held more frequently.

STRATEGY TO INCREASE OUR ABILITY TO ADAPT

- 1) The District will add the role of IT Manager to our District Leadership Team.
- 2) The District website will become the major source of support to our members and outreach to our communities.
 - The Committee that develops to work on our website will be encouraged to lend their expertise to individual Clubs that request help with Club websites.
- 3) District will encourage all Clubs to have an IT person, preferably on the club board, to enhance all IT functions of the club (specifically including hybrid meeting capability).
- 4) The District will provide Train the Trainer Sessions as part of our Learning and Development series.
- 5) The District will encourage, through training and leadership, an increase in the number of members on every District Committee, to include Brand, Foundation and Membership.
 - The District will require County Co-chairs for each of these three Committees to foster innovation and support for Clubs.
- 6) The District will explore moving from our monthly District Governor messaging as it now stands to Podcasts.
- 7) The District will explore and experiment with weekly District Governor to President messaging, and weekly email to all member messaging of various types.
- 8) The District will encourage all Clubs to become ClubRunner subscribers.

CALL TO ACTION

There are a large number of recommendations in this Strategic Plan that will require the active leadership of the District Governor Nominee, who is the lead on continuing our efforts going forward. As the person who holds that role and the various District Leadership Team roles evolve going forward, the Action Items will of necessity be changing. For this effort to succeed, all of us have to be willing to review, adapt and change our strategic efforts to meet the new and unforeseen challenges we will face in our Rotary lives and our Rotary world going forward.

