



Rotary District 5470

2020-2023 Strategic Plan

Strategic priority 1: Redesigning District Training

Annual Goal	Rotary International Action Plan	2020-2021	2021-2022	2022-2023
Improve RLI District Trainer RLI Co-Chairs	1. Increase Impact 3. Enhance Participation/Engagement	Integrate AG's into RLI Training Create a RLI Master Training Plan for the District Identify RLI Chairman Add virtual training options	Evaluate RLI progress. Implement the RLI Master Training Plan	Create RLI Graduate Study Program
Improve PETS District Trainer	1. Increase Impact 3. Enhance Participation/Engagement	Create PETS in virtual platform Implement the new PETS training schedule Create a Master Training Plan for the District Portion of Pets	Evaluate and adjust the PETS training schedule Execute the Master Training Plan for District Portion of PETS	

		Evaluate District 5470 PETS Training Create a Policy for PETS attendance		
Define Emerging Leaders Governor Line, Assistant Governors and Club Officers	3. Enhance Participation/Engagement 4. Ability to Adjust	Create a list of skills and attributes that can be identified in future emerging leaders Ask clubs to nominate 1-2 emerging leaders Ensure that EL's attend at least 1 RLI training and District Assembly Integrate RLI grads to various District committees	Evaluate and adjust Emerging Leaders Action Plan Create an Action Plan to train emerging leaders	
Restructure Assembly District Trainer	2. Expand our Reach 3. Enhance Participation/Engagement 4. Ability to Adjust	Create an Assembly Training Action Plan Implement Assembly Action Plan Evaluate Assembly Training Develop virtual assembly offering	Evaluate and adjust the Assembly Training Action Plan Develop virtual assembly offering	
Succession Planning District Governor Line and Assistant Governors	4. Ability to Adjust	Utilize AG's to develop strategies to support club succession planning Implement strategies for District Staff succession planning Develop strategies to support District Staff succession planning	Evaluate and adjust District strategies for succession planning	

<p>Assistant Governor Training</p> <p>District Trainer</p>	<p>2. Expand our Reach</p> <p>3. Enhance Participation/Engagement</p> <p>4. Ability to Adjust</p>	<p>Develop training plan for all AG's</p> <p>Implement the training plan</p> <p>Develop an AG Job Description</p>	<p>Evaluate and adjust the training plan</p>	
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Strategic priority 2: Building District 5470 Infrastructure

Annual Goal		2020-2021	2021-2022	2022-2023
<p>Update Policies</p> <p>District Admin and Management Chair</p>	<p>4. Ability to Adjust</p>	<p>Create District policies that address the most pressing district needs.</p> <p>Qualifications for Committee Chairman (RLI)</p> <p>Diversity</p> <p>Crisis Management</p>	<p>Review District policies.</p>	
<p>Revise District Budget Process</p> <p>Governor Line, District Treasurer</p>	<p>4. Ability to Adjust</p>	<p>Implement District 2020-2022 budget</p> <p>Evaluate budget for current</p> <p>Update Budget for new year</p>	<p>Implement District 2021-2023 budget</p> <p>Review success/failures of year 1 implementation.</p> <p>Update Budget for new year</p>	<p>Implement District 2022-2024 budget</p> <p>Update Budget for new year</p>

and District Finance Committee				
<p>Redesign District Administrative Structure</p> <p>Governor Line, Admin and Management Chair and District Board of Directors</p>	4. Ability to Adjust	<p>Review and adjust guidelines that will improve effectiveness of AG's.</p> <p>Evaluate the need for a District Fundraiser Board position</p> <p>Develop and implement, outcomes and strategies for a Leadership Team retreat</p> <p>Create a district board position for Fund Raising.</p> <p>Create and hire an Operations Manager</p>	<p>Develop district application form and process selection for AG's.</p> <p>Evaluate and adjust the goals and outcomes for the Leadership Team Retreat</p>	

Strategic priority 3: District Membership / Attracting and Engagement

Annual Goal		2020-2021	2021-2022	2022-2023
<p>Increase Net District Membership by 5-10% per year.</p> <p>Membership Chair and Committee</p> <p>Public Image Chair</p>	2. Expand our Reach	<p>Implement and Evaluate District Membership Plan.</p> <p>Develop and Implement the Power of One campaign</p> <p>Develop District Program for managing Rotary International Leads</p> <p>Increase membership by 5%</p>	<p>With the input from the Membership Committee, evaluate and adjust Membership Plan</p> <p>Develop additional yearly Master Plan on Club Development</p> <p>Increase Membership 10% utilizing data and programs developed by district</p>	

<p>Start a new club or satellite club in each District Quadrant (area).</p> <p>Governor Line, Assistant Governors, Club Presidents, District Membership Chair</p>	<p>2. Expand our Reach</p> <p>3. Enhance Participation/Engagement</p> <p>4. Ability to Adjust</p>	<p>Create Master Plan for New Club Growth</p> <p>Implement New Club Growth Master Plan</p> <p>Developing the Club Specialist for both the Front Range and Western Slope</p> <p>Develop a new club within each of the four quadrants</p>	<p>Implement New Club Growth Master Plan</p> <p>Develop a new club within each of the four quadrants</p>	
<p>Start a Rotaract Club in each quadrant (area).</p> <p>Governor Line, Assistant Governors, Club Presidents, District Membership Chair</p>	<p>2. Expand our Reach</p> <p>3. Enhance Participation/Engagement</p>	<p>Create Master Plan for Rotaract Club Growth</p> <p>Implement Rotaract Club Growth Master Plan</p>	<p>Implement Rotaract Club Growth Master Plan</p>	
<p>Support clubs in their effort to increase membership</p>	<p>2. Expand our Reach</p>	<p>Evaluate and adjust the Insta-Grant Program</p> <p>Expand the Membership Committee to include AG's</p> <p>Train current members of the committee to become specialists</p>	<p>Gather a collection of Best Practices and Successful Strategies from clubs with growing membership based on 2019-29 data.</p> <p>Develop a communication plan to share the strategies</p>	

<p>Membership Chair</p>		<p>of club development throughout the district</p> <p>Utilize the Learning Center information on Membership Development to enhance the education of AGs</p>	<p>Evaluate and adjust Club Specialist Program</p> <p>Support development of improved district financial programs for clubs to promote membership and grants</p> <p>Support “Power of One” program out of District</p>	
<p>Engagement Membership Chair</p>	<p>3. Enhance Participation/Engagement</p>	<p>Develop strategies to support club efforts to increase member engagement</p> <p>Develop a plan to attract and engage District 5470 Alumni</p> <p>Work with District PI Committee to enhance the attitude of club members from conservative focus to opportunity focus</p>		
<p>Increase the awareness for the People of Action campaign Public Image Chair</p>	<p>2. Expand our Reach</p>	<p>Share “Together We” posters at all district events</p> <p>Give each club a “Together We” poster with a photo of their own club members</p> <p>Train club PR Committees to make their own posters</p>	<p>Provide Insta-Grant funds to publish/boost</p> <p>“Together We” posters via local media</p>	

Strategic Priority #4 Building Rotary Foundation Giving

Annual Goal		2020-2021	2021-2022	2022-2023
<p>Increase the number of Donors in the District with EREY, Paul Harris Fellows, and Paul Harris Society</p>	<p>1. Increase Impact</p> <p>3. Enhance Participation/Engagement</p>	<p>Strengthen the Foundation committee with better defined roles.</p> <p>Develop Foundation programs to be presented to clubs both in person and by video.</p> <p>Increase EREY across the district by 10%</p> <p>Reestablish a foundation dinner in the District</p> <p>Encourage clubs to use club assemblies to educate members of the benefits of donating to TRF</p>	<p>Continue to use Foundation committee members to deliver in person programs to clubs.</p> <p>Build on the EREY campaign previously developed.</p> <p>Use District Paul Harris points for special recognition in the District.</p>	

<p>Achieve 100% club participation in donating to TRF Annual Fund, Polio Plus and Endowment</p>	<p>1. Increase Impact</p> <p>3. Enhance Participation/Engagement</p>	<p>Use all club visits by any District Staff members to continue stressing the importance of participation in TRF.</p> <p>Polio Plus continues to be the primary focus of RI, keep this in front of clubs.</p> <p>Work with noncontributing clubs showing the advantages of being part of the TRF.</p>	<p>Achieve 100% of clubs in the district that are participating with donations to TRF</p> <p>Polio Plus continues</p>	
<p>Voluntary club collaboration effort in a global grant. Increase the number of clubs applying for Distract Grants</p>	<p>1. Increase Impact</p> <p>2. Expand our Reach</p> <p>3. Enhance Participation/Engagement</p>	<p>Create Video training for clubs as to the steps necessary to formulate a Global Grant</p> <p>Monthly advise clubs of Global Grant opportunities.</p> <p>Increase the number of clubs applying for a District Grant by 5 clubs over the previous year.</p>	<p>Continue to assist clubs as they develop their District and Global Grant involvement.</p> <p>Keep clubs advised as to amount of District DDF available.</p>	

Strategic Priority #5 Building the Rotary Brand Experience

Annual Goal		2020-2021	2021-2022	2022-2023
Create District Governor Visit Experience Program (DGVE) Program	<ol style="list-style-type: none"> 1. Increase Impact 2. Expand our Reach 3. Enhance Participation/Engagement 	<ol style="list-style-type: none"> 1. Establish a Pilot program to leverage the District Governor Club visits to create an opportunity for clubs to run: 2. Power of One Membership Drive 3. Rotary Foundation Fund Raiser 	<ol style="list-style-type: none"> 1. Expand and refine the District Governor Visit Experience <p>Maintain relationships with community leaders based on DGVE Program</p>	<ol style="list-style-type: none"> 1. Expand and refine the District Governor Visit Experience <p>Maintain relationships with community leaders based on DGVE program</p>

		<p>4. Leadership Development Engagement</p> <p>Community Leader Engagement</p>		
<p>Establish Quadrant PIO's to work with the AGs</p>	<p>1. Increase Impact</p> <p>2. Expand our Reach</p> <p>3. Enhance Participation/Engagement</p>	<p>1. Identify and empower a qualified and motivated PIO for each of the four quadrants to assist the AGs</p>	<p>Quadrant PIOs identify and empower Area PIOs and initial club PIOs</p>	<p>Quadrant and Area PIOs expand and identify, empower and equip local club PIOs</p>
<p>Create an annual District PIO Communication and Marketing Campaign across all communication channels for internal District communications</p>	<p>1. Increase Impact</p> <p>2. Expand our Reach</p> <p>3. Enhance Participation/Engagement</p>	<p>1. Establish District Communication Channels across all sources and modern channels of media both online and offline to:</p> <p>Build Trust in the Rotary Community of District Leadership</p> <p>See PIO Planning Document</p>	<p>1. Expand and refine the District Marketing and Communications Campaign Implement Quadrant Marketing and Communications Campaigns</p>	<p>1. Expand and refine the District and Quadrant Marketing and Communications Campaign</p> <p>2. Implement Area and Club Marketing and Communications campaigns</p>

		<p>Build the Engagement of the District Rotary Tribe across District Strategic Plan Areas</p> <p>See PIO Planning Document</p>		
<p>Create an annual District PIO Communication and Marketing Campaign across all communication channels for external communications</p>	<ol style="list-style-type: none"> 1. Increase Impact 2. Expand our Reach 3. Enhance Participation/Engagement 	<ol style="list-style-type: none"> 1. Establish District Communication Channels across all sources and modern channels of media both online and off line to: <p>Engage Targeted Local Communities in each quadrant to expand Rotary awareness and relationship</p> <p>See PIO Planning Document</p> <p>Build the Engagement of Targeted Local Communities with Rotary Clubs</p>	<ol style="list-style-type: none"> 1. Expand and refine the District Marketing and Communications Campaign with additional local communities and organizations within the quadrants <p>Implement Quadrant Marketing and Communications Campaigns with local communities, and organizations.</p>	<ol style="list-style-type: none"> 1. Expand and refine the District and Quadrant Marketing and Communication Campaigns to additional communities and organizations within the quadrant 2. Implement Area and Club Marketing and Communication Campaigns with local community organizations to increase engagement on a club level.

		See PIO Planning Document		
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Strategic Priority #6 Expand and Improve Youth Services

Annual Goal		2020-2021	2021-2022	2022-2023
Purchase and Implement Youth Volunteer Management System	<ol style="list-style-type: none"> 1. Increase Impact 2. Expand our Reach 3. Enhance Participation/Engagement 	<p>Meet with Youth Services Chair and software developer to review the program.</p> <p>District purchase program and begin implementation</p> <p>Notify all clubs of upcoming option to do background checks on all youth volunteers</p>	<p>Review and refine the Management System</p> <p>Encourage clubs with youth programs to utilize the software</p>	<p>Review and refine the Management System</p> <p>Encourage all clubs to utilize the software program (ie new members)</p>
Identify and engage a background check system	<ol style="list-style-type: none"> 1. Increase Impact 	<p>Review several background check system/companies and make a recommendation to district leadership</p> <p>Identify and sign a contract with a background checking company and begin implementation</p> <p>All district level leaders will have a background check completed</p> <p>Notify all clubs of upcoming voluntary option to do background checks on all members</p>	<p>Review and refine the district wide implementation of the background check process.</p> <p>33% clubs utilizing the background check process with a focus on new members and any youth volunteers</p>	<p>Review and refine the district wide implementation of the background check process.</p> <p>67 % clubs utilizing background check process with a focus on new members, youth volunteers and community volunteers</p>

<p>Develop District Level Compliance Office Position</p>	<p>1. Increase Impact 3. Enhance Participation/Engagement</p>	<p>Develop job description that includes roles and responsibilities. Search and select a Rotary member to take on this role by January 2021.</p>	<p>Meet with DCO to update and refine the position and the services provided</p>	<p>Meet with DCO to update and refine the position and the services provided</p>
<p>Review and refine the Youth Protection Office position</p>	<p>1. Increase Impact 3. Enhance Participation/Engagement</p>	<p>Develop a job description that includes roles and responsibilities. Develop a budget line item to fund the position. Identify and contract with the selected YPO.</p>	<p>Meet with YPO to refine the position and services provided. Update contract.</p>	<p>Meet with YPO to refine the position and services provided. Update contract.</p>

Strategic Priority #7 Expand and Improve Community Service Programs

Annual Goal		2020-2021	2021-2022	2022-2023
Develop a Community Service Committee	<ol style="list-style-type: none"> 1. Increase Impact 2. Expand our Reach 3. Enhance Participation/Engagement 	<p>Identify various positions within the committee</p> <p>Identify and select committee members</p>		
Statement of Purpose	<ol style="list-style-type: none"> 1. Increase Impact 2. Expand our Reach 3. Enhance Participation/Engagement 	<p>Develop a statement of purpose for the Community Service Committee that addresses who it will serve and what the committee will do</p>		

**Develop an
Action Plan**

1. Increase Impact
2. Expand our Reach
3. Enhance
Participation/Engagement

Develop goals for the committee to address

Develop action steps and a timeline for the committee to achieve the goals