



STRATEGIC PLAN

Rotary International District 5495

APRIL 2019

Table of Contents

INTRODUCTION	3
Vision.....	3
Mission.....	3
Principles.....	4
STRATEGIES	5
Ethics (Leadership)	5
Influence (Service)	6
Engagement (Membership)	7
Sustaining (Youth Services)	8
Esteem (Public Image).....	9
STRATEGIC PLANNING COMMITTEE	10
Appendix 1 – Rotary International’s Strategic Plan	11

INTRODUCTION

Vision

We see a world where:

People unite and take action to create lasting change – across the globe, in our communities, and in ourselves.

Rotary is regarded as an organization...

- ... that develops and strengthens leaders.
- ... with a boundless capacity for good.
- ... of choice for those who serve.
- ... that attracts and develops young people.
- ... with a clear and compelling identity.

Mission

To Support and Strengthen Rotary Clubs, Focus and Increase Humanitarian Service, and Enhance Public Image and Awareness.

Principles

- **Ethics.** We take the Four-Way Test seriously and consciously apply it to the biggest of things and to the smallest of things in our personal, professional and Rotary lives. We live, work, play and serve in our communities with integrity.
- **Peacemaking.** Our thoughts, words, and actions promote peace, goodwill, and understanding. We remain open-minded as we practice active listening, finding value in the opinions and positions of others.
- **Leadership.** Everything hinges on leadership. Strengthening former, current and emerging leaders improves our impact and sustainability. We are committed to empowering youth and young professionals through our personal development programs.
- **Service.** We are resourceful in finding ways to improve the quality of life for people in their communities and to serve the public interest. We leverage the local and global grant-making power of The Rotary Foundation.
- **Relationships.** Strong, trusting relationships anchor our Clubs and District. We spend time with other Rotarians at every opportunity by attending District training events and conferences and visiting and supporting Clubs other than our own. This is where the magic happens. We love to celebrate the success of our Members and our Clubs.
- **Generosity.** We are compassionate and cheerful givers. We give freely to each other, our Clubs and our community, without expectation of reciprocity. The Rotary Foundation is a charity of choice for each of us. We are eager to contribute our expertise to solving problems and filling the needs of society.
- **Responsibility.** We consider the potential effect on others before taking action. We are strengthened by effective planning, both strategically and short term. Leadership at all levels is faithful in completing tasks and projects in a timely fashion.
- **Diversity.** We embrace the value of diversity and appreciate the various perspectives and skills that enrich us and give us strength. We seek to be inclusive in all aspects of our membership, service, and leadership. Our District and Clubs value and reflect our communities.
- **Collaboration.** We fully understand how partnering strengthens the impact of our service projects, our fundraising, and our reputation, within and between Clubs and Districts, and with partners in our communities.
- **Communication.** We communicate clearly, openly, frequently and honestly. We consider and utilize various ways to reach all Clubs and Members.

STRATEGIES

Ethics (Leadership)

We are regarded as an organization that develops and strengthens leaders.

- Professional leadership development opportunities
- Mentoring for Potential Leaders
- Rotary Leadership Institute
- Club Leadership Academy
- Arizona Rotary Leadership Academy

Goal #1: Succession

Ensuring appropriate leadership is available for all District positions.

Goal #2: Coordination

All leader education efforts are similarly aligned and directed.

Goal #3: Mentoring

Develop a mentoring program that pairs successful leaders with potential leaders.

Goal #4: Advisory

Council of Past District Governors is engaged in an advisory role with Governor Line.

Influence (Service)

We are regarded as an organization with a boundless capacity for good.

- Encouraging, facilitating, and enabling opportunities for clubs to serve humanity
- Service that spans our communities and the world
- Leveraging the Rotary Foundation to enable our service
- Developing community partnerships and alliances

Goals

- Actively support the eradication of Polio.
- Help to focus our clubs on service projects that show evidence of lasting impact with measurable outcomes.
- Encourage and facilitate an enriching service experience that engages and retains members.
- Continually adapt and evolve to keep pace with the changing needs of our volunteers and our beneficiaries.
- Provide streamlined and efficient governance to enable club projects.
- Plan and implement effective and inspiring training which helps volunteers to serve more effectively.
- Collaborate on projects with like-minded non-Rotary individuals and organizations.
- Increase the involvement of our youth and young adults in humanitarian service.
- Increase club and individual financial support for the Rotary Foundation, enabling sustainable funding for club projects now and in the future.

Engagement (Membership)

We are regarded as an organization of choice for those who serve.

- Fostering the development of lifelong friendships
- Unlimited individual and group service opportunities
- Flexible, relevant and agile club models
- Outreach via new club development

Goal #1: Extension

75% of the District's Areas will have started a Satellite Club by 6/30/2021

Goal #2: Growth

The District will rank in top 3 within Zone 26 in membership growth (%) by 6/30/2021

Goal #3: Retention

The District will rank in top 3 within Zone 26 in membership retention (%) by 6/30/2021

Sustaining (Youth Services)

We are an organization that attracts and develops young people, believes in their capabilities and provides them with leadership opportunities.

Goal #1: Global

Increase the number of countries with whom we exchange Interact and Rotaract members, and with whom we can partner in international service projects.

Goal #2: Alumni

Continually challenge and help the alumni of our Interact, RYLA, Rotary Youth Exchange, Rotaract, and NGSE to move onward and upward in their Rotary service.

Goal #3: Database

Develop a workable and maintainable database to track the members of our Rotary Youth Services programs, to enable continuing Rotary communication with them until they are ready for Rotary.

Goal #4: Expansion

Convince more of our Rotarians of the importance of personally working with our youth programs, and the personal thrill and benefits to be gained from their service.

Goal #5: Partnerships

Continue to seek and to develop more appropriate corporate sponsorships for our Rotary Youth Services programs, to help fund and facilitate more international service opportunities for our Arizona youth.

Esteem (Public Image)

We are regarded as an organization with a clear and compelling identity.

- Championing our unique value propositions
 - We can do more because we can be more
 - Rotary is not only a place you go to; it is a place you go from
 - Personal/Professional Leadership Development
 - A vast network of community leaders
 - Highly regarded funding engine
 - Global marketing and brand identity
- Providing professional communications
- Convening capability within communities
- Promotion of club projects and efforts

Goal #1: Brand

Enhance how people outside and inside of Rotary feel about the difference Rotary makes locally and globally.

Goal #2: Membership

Provide easy, clear and compelling ways for members to invite others to check out Rotary, and be inspired to invite others.

Goal #3: Service

Share fellow Rotarian stories of local, regional and international service projects that inspire and build brand value.

STRATEGIC PLANNING COMMITTEE

- The Committee shall consist of six Rotarian members who have a broad range of experience in Rotary and with strategic planning, and where possible, at least one member is thirty-five years old or younger. The District Governor shall designate one member to serve as Committee Chairperson. Each member shall be elected for a three-year term.
- At the District Council on Legislation, the Club delegates shall elect the number of Rotarians necessary to maintain the required Committee composition.
- The District Governor shall by appointment fill any vacancy occurring on the Committee because of death, resignation or removal during his/her term of office.
- The Committee shall conduct an annual review of the District Strategic Plan and report its findings to the Clubs at the District Council on Legislation.
- In consultation with District officers and other committees, the Committee shall draft and put forth for approval at the District Council on Legislation recommended amendments to the District Strategic Plan complying with the time requirements of Article VI of the District Bylaws.
- The Committee shall advise the District Governor of any actions within the District that deviate from the District's Strategic Plan. The District Governor shall direct the District to adhere to the District's Strategic Plan or shall ask the Committee to submit change(s) to the District's Strategic Plan to the Clubs, for their approval, at the next District Council on Legislation.
- The Committee shall meet no less than semi-annually at the discretion of its Chairperson as to date, time, and place.
- Committee Composition:
 - PDG Chuck Fitzgerald, Chair, (through June 30, 2019)
 - PDG George Wheeler (June 30, 2019)
 - PDG Charlie Tegarden (June 30, 2020)
 - Marcy Maslov (June 30, 2020)
 - Teresa Giarrusso (June 30, 2021)
 - <vacant> (June 30, 2021)



Appendix 1 – Rotary International’s Strategic Plan

Rotary

STRATEGIC PLAN

OUR VALUES IN ACTION

Through **fellowship**, we build lifelong relationships that promote greater global understanding.

With **integrity**, we honor our commitments and uphold ethical standards.

Our **diversity** enables us to connect different perspectives and approach problems from many angles.

We apply our vocational expertise, **service**, and **leadership** to tackle some of the world’s greatest challenges.

OUR STRATEGIC GOALS

Support and strengthen clubs

- Foster club innovation and flexibility
- Encourage clubs to participate in a variety of service activities
- Promote membership diversity
- Improve member recruitment and retention
- Develop leaders
- Start new clubs
- Encourage strategic planning at club and district levels

Focus and increase humanitarian service

- Eradicate polio
- Increase sustainable service focused on programs and activities that support youth and young leaders and Rotary’s six areas of focus
- Increase collaboration and connection with other organizations
- Create significant projects both locally and internationally

Enhance public image and awareness

- Unify image and brand awareness
- Publicize action-oriented service
- Promote core values
- Emphasize vocational service
- Encourage clubs to promote their networking opportunities and signature activities

JOIN LEADERS | EXCHANGE IDEAS | TAKE ACTION www.rotary.org/strategicplan



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<https://my.rotary.org/en/learning-reference/about-rotary/strategic-plan> (Retrieved, November 3, 2018)

Rotary's strategic plan sets the framework for our future, ensuring that we continue to be known as a respected, dynamic organization that advances communities worldwide.

As we stand on the cusp of eliminating polio, it is time for us to create a new path toward bringing more people together, increasing our impact and creating even more lasting change around the world.

Rotary leadership is developing a strategic plan that will help guide our organization from Rotary year 2020 and beyond. Our current plan guides our work through Rotary 30 June 2019.

In June, Rotary's Board of Directors and Trustees approved four key priorities and objectives to serve as the foundation for the next strategic plan:

Increase our impact Rotary strives to change the lives of others for the better. Our members invest volunteer and financial resources in a broad range of service activities, but we will do a better job of measuring the results and outcomes of our work. So that Rotary can continue to attract members, partners, and donors, we'll focus our programs and produce evidence of lasting impact.

Related objectives:

- Eradicate polio and leverage the legacy
- Focus our programs and offerings
- Improve our ability to achieve and measure impact

Expand our reach People are seeking ways to make a difference in the world and connect with others. How do we help them find what they're looking for in Rotary? By creating unique opportunities for more people and organizations to get involved. Clubs will always be important. But to extend our global reach, we'll expand our current structure with innovative models that welcome more participants into Rotary and give them meaningful ways to unite and take action.

Related objectives:

- 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

Enhance participant engagement Because we recognize the challenges our clubs face in today's changing world, Rotary will support our clubs' efforts to deliver an experience that engages and retains members. When we help clubs focus on the experience and value they give their members, we give Rotarians and other participants the opportunity to serve together, connect with one another, and have a more satisfying experience with Rotary.

Related objectives:

- 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

Increase our ability to adapt To achieve our vision and keep pace with changing global trends, our structure and culture must evolve. We'll ensure that our operating and governance structures are efficient, flexible, and effective in delivering services to all of our participants.

Related objectives

- 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