Rotary District 5520 Strategic Plan

Effective July 1, 2026 - June 30, 2029

This plan was created in its initial form at the District 5520 Long Range Planning Session, Socorro, NM, September 2019, and has been reviewed/revised each Rotary year since then with the support of the District Strategic Planning and Innovation Cadre.

Preamble

To the Clubs of District 5520:

This District 3-year Strategic Plan was developed to be implemented in conjunction with you, our Clubs, and in alignment with our District Three-Year Rolling Goals Plan. For a number of the Priorities, which have both a Club and District role to accomplish their goals, we allude to several Club-level objectives related to Membership, the Rotary Foundation, Public Image, and Service Projects. These are not mandates, simply suggestions. The District and Clubs will be working collaboratively regarding these objectives. You'll notice that the objectives for these priorities are listed as "objectives/aspirations" to reflect that these are not mandates.

For Priorities 1-5, which are specifically District Priorities and Objectives, you as our Clubs are our customers and, ultimately, our Bosses! As such, it is up to you to hold us accountable for these objectives, and we will be reporting regularly to you on our progress, not just with these but with the other priorities as well.

On behalf of the entire District Leadership Team, we greatly appreciate the opportunity to work with you to strengthen our District as well as our Clubs. We believe in a culture of improvement, and we intend to attain and maintain excellence in everything we do.

Jeff Weinrach, District 5520 Governor _____ Date 5/31/26

Laura Gonzales, District 5520 Governor Elect _____ Date 05/31/2026

Mark Goodman, District 5520 Governor Nominee _____ Date 6/8/26

Revised May 15, 2026

Rotary District 5520 Purpose Statement

Statement of Purpose:

Rotary District 5520 empowers Rotary Clubs within our District to turn the Rotary International Vision Statement ("*Together, we see a world where people unite and take action to create lasting change – across the globe, in our communities, and in ourselves.*") into reality by providing the support, resources, and learning opportunities necessary for Clubs to thrive, grow, and **Create Lasting Impact** for good in their communities and around the globe.

Note about Six Rotary International High-Priority Goals

Rotary International, through its three-year goal initiative, has identified six key goals for all Clubs to address. Those goals are documented within our strategic plan as part of our "Success Measures" sections with a * at the beginning of the statement.

District Priority 1: Foster a Culture of Relationship, Accessibility, Respect and Collaboration (e.g., across the District, District/Club, Club to Club) based on the Four-Way Test

Objective: Based on feedback from at least 80% of Clubs in our District, at least 80% of respondents are "highly satisfied" with the District Culture, measured through tools including 360° Review and Club/Member Feedback by the end of the 2028-29 Rotary Year.

This would need to be demonstrated (via core values) through the various District Committees including Rotary Foundation, Membership, Public Image and Service. As per Raj Sisodia's "Conscious Capitalism", we would consider all four tenets:

1. Higher Purpose,
2. Caring Cultures,
3. Stakeholder Integration, and
4. Conscious Leadership.

Responsible Parties:

- Primary Responsibility: District Governor (DG) Jeff, District Governor Elect (DGE) Laura, District Governor Nominee (DGN) Mark, District Governor Nominee Designate (DGND), District Vice Governor (DVG) Sunny Kellerman

- Lieutenant Governors (LG's), Assistant Governors (AG's), All District Committee and Committee Chairs including the District Club Engagement Committee in a support role

District Priority 2: Create and effectively manage and make available our knowledge assets, including policies and procedures, meeting minutes, bylaws, and other key documents and information

Objective: 10% increase from baseline and/or 50% of respondents or more "highly satisfied" related to "we have what we need, we know where to find it, and we know how to access it" by the end of the 2028-29 Rotary year. (We will conduct the survey at both District and Club levels – at Club level, it would be related to District assets, not Club assets).

Success Measures:

- Club/Member satisfaction related specifically to District documentation

Responsible Parties:

- Primary Responsibility: District Policies/Procedures Committee co-Chairs (DVG Sunny Kellerman and PDG Dick Jones) and District Executive Secretary Brent Bateman
- DG Jeff, DGE Laura, DGN Mark, DGND, LG's and AG's
- Historian Pam Lillibridge

District Priority 3: Develop and implement effective communication/information sharing structure and protocols

Objective #1: 80% of respondents or more "highly satisfied" with District communication/information sharing by the end of the 2028-29 Rotary Year.

Objective #2: Improve effectiveness of AG's as "concierges" to their Clubs (as measured by Clubs and by the District Governor)

Success Measures:

- Number of Rotarians year over year (using existing data to establish our baseline) who open e-mail, respond to district requests, open newsletters, etc.
- Number of Rotarians year over year (using existing data to establish our baseline) who have a complete District profile in ClubRunner
- Number of AG reports per Club submitted for DG and LG review each Rotary year (4 should be number of reports per year)

Responsible Parties:

- Primary Responsibility: District Learning Facilitator Jen Dresser
- DG Jeff, DGE Laura, DGN Mark, DVG Sunny, DGND, Lieutenant Governors (LG's), Assistant Governors (AG's)
- District Executive Secretary Brent Bateman, District Public Image Committee (including District Newsletter publisher)

District Priority 4: Cultivate and Motivate Leaders

Objective: Each year, all District Leadership posts are filled including full and functioning District Committees, and each Committee has a succession plan developed and in place. Leadership positions are filled with a focus on people who will promote, reinforce, and embrace our District and RI plan, vision, values, priorities.

Success Measures:

- Number of District Committees that have developed a succession plan
- # (or %) of Rotarians who attend RLI
- # (or %) of PE's who attend PELS
- # (or %) of AG's and LG's that attend AG/LG training
- Number of new leaders who have been identified by the District and who serve in a Club or District leadership role
- # of District Governor nominations/applications
- # (or %) of new leaders completing Rotary Education Center courses for their specific role.
- # (or %) of current or past leaders mentoring emerging leaders.
- # (or %) of emerging leaders being mentored annually.
- # (or %) of emerging leaders who felt the District provided adequate leadership support for their position.
- # (or %) for leader retention year to year in their current position or in a different position.
- How well do new leaders in committee, board or chair positions feel prepared to function in their new role?
- # (or %) Retention rate for new leaders after serving in their first leadership role.
- Diversity of leadership candidates across age, profession, geography, experience and gender.

Responsible Parties:

- <u>Primary Responsibility</u>: DG Jeff and District Leadership Development Coordinator Bill Rothweiler
- DGE Laura, DGN Mark, DVG Sunny, DGND, Immediate Past District Governor Tom, LG's, AG's, District Learning Facilitator Jen Dresser

District Priority 5: Attain/Maintain Excellence at all levels and for all roles within our District

Objective #1: Support the Clubs by ensuring that all aspects of our District are implemented with excellence (as defined for each District Leadership Team member and for each Committee/function and by ensuring that all District Leadership Team member and each Committee has measurable goals for excellence each year) including having the resources (e.g., financial, public image/awareness, people) they need to empower Clubs and produce desired results/outcomes in alignment with RI and other District priorities.

Objective #2: Support the Clubs by ensuring that all Clubs have a strategic plan in place aligned with Rotary International priorities.

Success Measures:

- *All Clubs within our District have an up-to-date strategic plan in place.
- Favorability improved by 10% from our Clubs on the value/effectiveness of the District in conjunction with the District's Value Proposition (which may be different for different Clubs)
- All District Leadership Team members have a definition of excellence to be used to gauge performance

Responsible Parties:

- Primary Responsibility: DG Jeff
- DGE Laura, DGN Mark, DVG Sunny, DGND
- LG's and AG's
- All District Committee Chairs and Committees
- District Performance Excellence Committee (coordination/support role)

District Priority 6 (in collaboration with Clubs): Build and grow the awareness of Rotary and expand the knowledge of Rotary's mission and activities in our District's communities – to expand our reach, increase our impact, and grow our membership.

Objective/Aspiration

Support every Rotary club in confidently and consistently sharing their impact with the public — using tools, storytelling, and platforms that align with Rotary's brand and mission.

Rather than focusing solely on content quantity or percentage growth, this strategy empowers clubs with skills, templates, and recognition. Progress will be measured by visibility, participation, and consistency across platforms.

Success Measures

At the Club level:

- Every club maintains a minimum digital presence:
  - A functional, up-to-date website
  - One active public-facing social media platform of their choice (e.g., Facebook, Instagram, LinkedIn, YouTube)
- Percentage of clubs that have a public image chair, club storyteller and/or designated photographer.
- Percentage of clubs that complete at least one Quarterly Public Image Challenge each year
- Percentage of clubs that submit at least one story or press release to the district annually
- Percentage of clubs that include a public image line item in their club budget
- Percentage of clubs that are proactively tracking the effectiveness of their public image activities.

At the District level:

- Increased engagement with district media channels (Facebook, Instagram, LinkedIn, newsletter)
- Increased story submissions and event promotions from clubs
- Support Clubs at all aspects of projects/events: pre-event, during event, after event
- Well publicized link on District website to Zone Public Image Resources
- Encourage clubs to submit events in advance to the Yucca so that other clubs can help/participate
- Establishment of a District Story Squad to help document and share service from under-resourced or smaller clubs
- Growth in brand-aligned storytelling across external-facing media, including:
  - A district LinkedIn page dedicated to Rotary success stories
  - An active news bureau function that distributes selected stories to local press outlets and community blogs
  - A shared repository of district-approved press releases and success stories

Responsible Parties

- <u>Primary Responsibility</u>: District Public Image Committee and Chair
- District Membership Committee, District Rotary Foundation Committee, District Service Projects Committee
- DG Jeff, DGE Laura, DGN Mark, DVG Sunny, DGND
- LG's and AG's
- Club Presidents, Presidents-Elect, and Club Public Image Committees or Story Teams

District Priority 7 (in collaboration with Clubs): Improve Membership Recruitment and Retention

Objective/Aspiration: Achieve an average of 3% net growth in membership year-over-year. (as measured by end-of-year statistics and by using existing data to establish our baseline).

Objective/Aspiration: Establish at least 2 new Satellite Clubs and two new Rotary Clubs (including at least one of a new Club type) in the District.

Objective/Aspiration: Support each Club being a "Vibrant Club"

Success Measures:

- *For each Club in our District, Number of active members at the end of each Rotary year through the 2028-29 Rotary year
- For each Club in our District, number of active members recruited and number of active members retained at the end of each Rotary year through the 2028-29 Rotary year
- At Club and District levels (aggregated from Club results), active member engagement survey results
- Results of Rotary International Database showing current number of active Clubs and Satellites showing increase over the previous year.

Responsible Parties:

- Primary Responsibility: District Membership Committee and Chair
- District Rotary Foundation Committee, District Public Image Committee, and District Service Projects Committee.
- DG Jeff, DGE Laura, DGN Mark, DVG Sunny, DGND
- LG's and AG's
- Club Presidents, Club Presidents-Elect, and Club Membership Committees

District Priority 8 (in collaboration with Clubs): Increase Participation in all Rotary Foundation Programs

Objective/Aspiration #1: Confirm and empower a Rotary Foundation contact person for every club in the District.

Objective/Aspiration #2: Increase by 5% the number of Clubs contributing to the Rotary Foundation by the end of the 2028-29 Rotary year.

(Rotary Foundation reports will be used to establish baseline)

Objective/Aspiration #3: Through promotion and education, increase the District's overall understanding of The Rotary Foundation (e.g., in addition to Club-specific Foundations) so that we can better appreciate its programs and better utilize the funding available to the benefit of our Clubs and Communities.

Objective/Aspiration #4: Establish and expand the opportunities for Individuals and Clubs to participate in Rotary Foundation programs and events – (i.e., host a Foundation Program at a Club meeting, host an event in support of Polio Plus, schedule a Foundation Fund Raiser or Training, attend a District sponsored Foundation event such as the International Project Fair or a District Foundation Assembly).

More Rotarians will be willing to give to the Foundation.
when they feel more involved with the Foundation!

Success Measures:

For each Club in our District…

- *Amount of money donated to the Rotary Foundation Annual Fund, Polio Plus and other programs.
- *Increase number of individuals or couples who inform the Rotary Foundation of their intent to include the Endowment Fund as a beneficiary in their estate plans, or who make any outright gift of $1000 or more to the Endowment Fund.
- Total Club giving to all foundation programs.
- Number of Clubs that support the Rotary Foundation each Rotary year
- Number of Clubs that conduct a Rotary Foundation program and/or event, and the number of Rotary members who participate

Responsible Parties:

- Primary Responsibility: District Rotary Foundation Chair and Committee
- District Membership Committee, District Public Image Committee, and District Service Projects Committee.
- DG Jeff, DGE Laura, DGN Mark, DVG Sunny, DGND
- LG's and AG's
- Club Presidents, Club Presidents-Elect, and Club Rotary Foundation Committees

District Priority 9 (in collaboration with Clubs): Increase Participation in all Rotary Club and District Service Projects

Objective/Aspiration #1: Increase by 25% the number of Rotarians in District 5520 who participate in Club and/or District service projects by the end of the 2028-29 Rotary Year (using existing data to establish our baseline)

Objective/Aspiration #2: 100% of Clubs participate in service projects (e.g., the Club's own projects, another Club's projects, the District's projects) by the end of the 2028-29 Rotary Year

Success Measures:

- *For each Club in our District, number of members who participate in service projects
- At Club and District levels (aggregated from Club results), number of Clubs that develop and implement service projects (i.e., their own projects)

Responsible Parties:

- Primary Responsibility: District Service Projects Committee Chair and Committee
- District Membership Committee, District Public Image Committee, and District Rotary Foundation Committee
- DG Jeff, DGE Laura, DGN Mark, DVG Sunny, DGND
- LG's and AG's
- Club Presidents, Club Presidents-Elect, and Club Service Project Committees