

# DISTRICT 5230 ACTION PLAN 2022 - 2023

*Rotary 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.*

## A. ACTION PLAN PRIORITY – INCREASE OUR IMPACT

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

Annual Goal	Actions	Resources Needed	Member Assigned	Timeline
Annually update Action Plan that compliments RI's objectives and communicate to members	<ul style="list-style-type: none"> <li>- Develop and review with District Leadership, BOD's and Club President-Elects to get input and support</li> </ul>		Mackey, Moser, Hale, Rabara, District BOD's and Leadership, Club Leadership	To BOD, District Leadership and Presidents/PE's for input by June 15, 2022
<p>Provide training for all levels of the District</p> <p>Create committee and strategic plan</p> <p>Promote and integrate Learning Center</p>	<p>Develop a training plan for the year which will:</p> <ul style="list-style-type: none"> <li>- Offer focused training for President-Elects, Committee Chairs and Assistant Gobs</li> <li>- Emphasize practical training for Club Leadership &amp; members on a monthly basis including: DaCdb, Finance/Melio, MyRotary, Rotary Direct, public speaking etc.</li> <li>- Offer a remote Club Training Assembly for Club and District Leaders</li> <li>- Support District Grants training program</li> </ul>	<p>Master training calendar</p> <p>Training sessions on Zoom</p> <p>Learning Center and LC reports</p> <p>Toastmasters</p> <p>Training materials (District, RI and Zone)</p>	<p>Winey, Volosin, Moser, Hale</p> <p>With input from Board and District Leadership</p>	<p>Monthly Pres/AG and AG/Chair meetings</p> <p>Create a calendar for the year by June 15, 2022</p> <p>CTA March, 27 – 30, 2023</p> <p>Ongoing Monthly trainings</p> <p>District Grants training: Spring</p>

# DISTRICT 5230 ACTION PLAN 2022 - 2023

<p>Increase support of the Rotary Foundation to increase funds for our District and International Grants</p>	<ul style="list-style-type: none"> <li>- Develop Foundation Team Action Plan with strategies on how to reach \$150 per capita</li> <li>- Hold monthly Foundation Committee meetings to monitor progress</li> <li>- Hold large event as major RI fundraiser</li> <li>- Train clubs on how to initiate recognition programs such as 100% PHF or EREY</li> <li>- Work with training committee to set up Rotary Direct training</li> <li>- Actively reach out to members who are nearing next levels and/or Triple Crown status and discuss how to reach. Schedule DG presentations to Triple Crown winners and other milestones</li> <li>- Set annual Polio Plus fundraising goal and create events to meet that goal</li> </ul>	<p>My Rotary Accounts Foundation education</p>	<p>Grebmeier, Brown, Pauli, Daguilo, Anderson, Mackey, Winey, Volosin, AG's, Club Presidents and Club Foundation Chairs</p>	<p>Develop action plan by June 30, 2022</p> <p>Monthly meetings</p> <p>Major event:??</p> <p>CTA in Spring</p> <p>Club Foundation Chairs training session in Fall</p>
<p>Encourage Clubs to apply for District and Global Grants and celebrate successes</p> <p>Develop partnerships for Global Grants</p>	<ul style="list-style-type: none"> <li>- Offer annual District and Global Grants training for Club eligibility</li> <li>- Publicize grants projects in Newsletter</li> <li>- Hold monthly ad hoc Grants team meetings</li> </ul>	<p>Grants Training</p> <p>Website page on Global Grant Projects</p> <p>Newsletter Articles</p>	<p>Brown, Pauli, Winey, Volosin, Hershey, Club Leadership</p>	<p>Website info on grants, forms, training sessions in May, grants due in July, Newsletter Articles to celebrate projects</p>

# DISTRICT 5230 ACTION PLAN 2022 - 2023

## **B. ACTION PLAN PRIORITY – EXPAND OUR REACH**

- 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

<b>Annual Goal</b>	<b>Actions</b>	<b>Resources Needed</b>	<b>Member Assigned</b>	<b>Timeline</b>
Form 5 new clubs, 2 of which will be under the new club models (cause based, e-clubs, Rotaract etc.)	<ul style="list-style-type: none"> <li>- Advocate to all members that new clubs are welcome</li> <li>- Encourage AG’s to act as advocates in their areas to identify potential new clubs</li> <li>- Train members regarding opportunities and mechanisms to set up new clubs</li> </ul>	Budget to support new club developed  Grow Rotary Tools  Learning Center Training	Sherer, Y. Atila, Wiseman, AG’s, Club Leadership	Ongoing
Emphasize membership engagement and DEI goals with existing clubs	<ul style="list-style-type: none"> <li>- Hold membership engagement training - Membership Chairs</li> <li>- Introduce Entrance Interviews to meet new member needs</li> <li>- Hold a DEI training for clubs</li> <li>- Encourage clubs to reach out to terminated members and alumni regarding new options</li> </ul>	Zone Membership resources		5 new clubs by June 30, 2023 (Includes Rotary, Rotaract and Interact)
Integrate Rotaract Clubs as full Rotary members	<ul style="list-style-type: none"> <li>- Include Rotaract Clubs in President Mtgs and DG visits</li> <li>- Add Rotaract Clubs to District and Global Grants training</li> </ul>		Lawson, DRR, Zone Membership Rep, Greenlee, AGs	
Support and increase Interact Clubs	<ul style="list-style-type: none"> <li>- Target areas without Interact Clubs and work with AGs to support new clubs</li> </ul>			

# DISTRICT 5230 ACTION PLAN 2022 - 2023

<p>Support District integration and collaboration</p>	<ul style="list-style-type: none"> <li>– Create opportunities for clubs to work together through service projects and area socials</li> <li>– Include branding, identifying new clubs, joint meetings, fundraisers, pairing experienced clubs with those needing assistance</li> <li>– Include Rotaract in AG’s Area meetings and projects</li> <li>– Increase collaboration of clubs around common causes and shared projects (Empowering Girls?)</li> <li>– Encourage members to attend other club’s meetings</li> </ul>	<p>Budget to support</p>	<p>Kenoyer, Patrick, N. Clancy, T. Brown, Dippel, AG’s, Scherer, Y. Atila, Wiseman, Hershey, Club Membership, Public Image &amp; Community Service Chairs</p>	<p>Ongoing</p> <p>Area service projects and socials in Spring and Fall</p>
<p>Complete or review current Community Needs Assessments with clubs and partners to create impactful service projects</p> <p>Encourage new groups to join club service projects and social events</p>	<ul style="list-style-type: none"> <li>– Provide training and resources for Clubs to either complete a Community Needs Assessment in their areas or coordinate with other agencies who are already conducting community needs assessments</li> <li>– Assess where new Rotary Club development would be helpful</li> <li>– Assist Clubs in developing action plans with information gained</li> <li>– Coordinate with other service organizations to support the community</li> </ul>	<p>Survey tools Analysis and action planning support</p>	<p>Winey, Volosin, Kenoyer, Patrick, N. Clancy, T. Brown, Dippel, Y. Atila and Club Community Service Chairs</p>	<p>All clubs completed by June, 2023</p>
<p>Continue to grow our ability to share our Club and District impact through enhancing our Public Image</p>	<ul style="list-style-type: none"> <li>– Assist Clubs and District with new and existing methods to support and highlight Rotary activities</li> </ul>	<p>Website Newsletter Social Media Promotional materials</p>	<p>Hershey, Patrick, Daniels, Grim, Club Presidents and Public Image Chairs</p>	<p>Ongoing</p>

# DISTRICT 5230 ACTION PLAN 2022 - 2023

## C. ACTION PLAN PRIORITY – ENHANCE PARTICIPANT ENGAGEMENT

- 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

<b>Annual Goal</b>	<b>Actions</b>	<b>Resources Needed</b>	<b>Member Assigned</b>	<b>Timeline</b>
Add District Attraction/Engagement Chair and DEI Chair to District Leadership Positions	<ul style="list-style-type: none"> <li>– Appoint appropriate members</li> <li>– Provide training for area of responsibility</li> <li>– Assist with developing committee and action items</li> </ul>	Learning Center and Zone/RI resources Budget	Mackey, Moser, Winey, Volosin, Scherer, Wiseman, DEI	July, 2022
<p>Create Territory Membership Liaison positions to assist clubs with attracting and engaging membership with a focus on DEI</p> <p>Build on Rotaract and Interact relationships</p> <p>Emphasis “Each One, Bring One”</p>	<p>Develop structure</p> <ul style="list-style-type: none"> <li>– Engage Clubs and AG’s in recruitment and training of Liaisons</li> <li>– Select Liaisons and provide appropriate training and expectations</li> <li>– Develop Membership Team Action Plan with strategies on how to start 5 new clubs, 2 of which are under the new models</li> <li>– Membership Committee meet monthly to share updates and strategize</li> <li>– Increase District membership by 5%</li> <li>– Increase District membership of women to 35%</li> <li>– Increase District membership of under 40 to 12%</li> <li>– Appropriately assign and follow membership leads, refer to other clubs if necessary</li> </ul>	Learning Center and Zone/RI resources Budget	Moser, Winey, Volosin, Scherer, Wiseman, DEI, AG’s, Lawson, Greenlee, Club Presidents and Membership Chairs	<p>July, 2022</p> <p>Celebrate membership increases and refer those clubs as resource</p> <p>Increases in membership by June 30, 2023</p>

# DISTRICT 5230 ACTION PLAN 2022 - 2023

	<ul style="list-style-type: none"> <li>– Train clubs on how to handle “walk-in’s”</li> </ul>			
<p>Survey District membership regarding leadership, committee and special talents interest. Encourage clubs to conduct a club-based survey for members personal and professional growth</p>	<p>Complete survey to assist with member engagement, development and succession planning</p> <ul style="list-style-type: none"> <li>– Match interest with Chair, committee and training opportunities</li> <li>– Include special interest topics in Speakers Bureau</li> <li>– Include Rotaract</li> <li>– Provide Clubs with RI tools to survey membership</li> </ul>	<p>Survey Monkey Analysis and follow up Zoom Zone/RI resources</p>	<p>Moser, Winey, Volosin, Scherer, Wiseman, Palladino, Club Presidents, Club Membership Chairs</p>	<p>District survey done Jan. 2022, conduct new survey in January 2023</p> <p>Analysis and follow up ongoing</p> <p>Member survey during year</p>
<p>Build on Speakers Bureau</p>	<ul style="list-style-type: none"> <li>– Include all District Chairs and leaders in a database of options for club meeting and training</li> <li>– Include links for The Learning Center, Zone 26/27 and other resources to enhance meetings and member engagement</li> <li>– Include Rotaract</li> </ul>	<p>Website update and contact information</p>	<p>Hershey, Patrick, Grim, Winey, Volosin, Lawson, Club Program Chairs</p>	<p>Ongoing</p>
<p>Offer DG Line Open Forums (Ask Us Anything) and provide District new member orientation to enhance engagement</p>	<ul style="list-style-type: none"> <li>– Send District email welcoming new members and providing information about and opportunities available in the District</li> <li>– Offer quarterly Ask Us Anything sessions via Zoom for all members</li> <li>– Offer Rotary 101 sessions via Zoom for new members</li> <li>– Add new members welcome to newsletter</li> </ul>	<p>DacDb Zoom</p>	<p>Moser, Hale, Rabara, Grim, Winey, Volosin, Daniel</p>	<p>July, 2022</p>

# DISTRICT 5230 ACTION PLAN 2022 - 2023

Re-establish District 5230 Yellow Pages	<ul style="list-style-type: none"> <li>– Develop site, sell memberships (Rotarians in and outside of the District), promote site for Rotarians to utilize services from Rotarians.</li> <li>– Profits will be utilized for Vocational Scholarships administered by the Clubs in the Counties of our District</li> </ul>	Public Relations expertise, site management	Isherwood, Hershey, AG's and Clubs	July, 2022 establish site, scholarships rewarded before June, 2023
---	---	---	------------------------------------	--

## **D. ACTION PLAN PRIORITY – INCREASE OUR ABILITY TO ADAPT**

- 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

Annual Goal	Actions	Resources Needed	Member Assigned	Timeline
Work with Presidents and AG's to develop meaningful, data driven Club goals through Rotary Club Center in order to qualify for an RI Citation and District awards	<ul style="list-style-type: none"> <li>– Train Presidents regarding Membership and Foundation history and how to project goals from Club historical data</li> <li>– Review RI and District Action Plans to build goal foundation and understanding</li> </ul>	RI and District Action Plans and goals Rotary Club Central RI/Zone resources	Moser, Hale, Rabara, Grebmeier, Scherer, Wiseman, Club Presidents, AG's	By July, 2022 clubs establish goals and enter projects in RCC which will be utilized for 2023 District Conference Awards & RI Citation
Annually review and update District P&P manual to include changes in RI and with a focus on streamlining processes	<ul style="list-style-type: none"> <li>– Review RI policies and personalize for District</li> <li>– Review with DG, BOD, Resolutions Committee, and Club Presidents for input</li> <li>– Submit resolutions to make changes to Clubs for approval at Business Meeting</li> </ul>	RI policies, samples from other Districts, Committee Review	Moser, Hale, Rabara, Belton, BOD's, AG's, District Leadership, Club Presidents and Clubs	Resolutions Committee schedule in 2022-23, vote at Business Mtg on April 22, 2023

# DISTRICT 5230 ACTION PLAN 2022 - 2023

<p>Integrate Rotaract into District 5230 DacDb Identify and include District Rotaract Representative (DRR) in the District BOD and include Rotaract in District Committees</p>	<ul style="list-style-type: none"> <li>- Obtain approvals from Rotaract Presidents to integrate Rotaract into DacDb. Add clubs and members to system, and provide training for upkeep</li> <li>- Identify DRR</li> <li>- Explore other options where Rotaract can be included at the District level</li> </ul>	<p>DacDb Learning Center and Zone/RI resources</p>	<p>Moser, Lawson, BOD's, DRR, District Chairs, Fremming, Barnwell</p>	<p>Fall, 2022</p>
<p>Modernize the District's document storage and distribution program</p>	<ul style="list-style-type: none"> <li>- Set up an account to allow shared document editing</li> <li>- Improve storage of documents on the cloud</li> </ul>	<p>Free document sharing programs Existing BOX document storage through Zones 26/27</p>	<p>Hale, Winey</p>	<p>December, 2022</p>
<p>Assure a robust succession plan for District Governor Line</p>	<ul style="list-style-type: none"> <li>- Create and/or update District Job Descriptions</li> <li>- Assess current District officers and committees</li> <li>- Propose changes, new positions, retention</li> </ul>	<p>Other Districts Rotary International D5230 Historical information</p>	<p>Hale, Moser, Rabara, Winey</p>	<p>December, 2022</p>

**\*\*Oversight and monitoring will be the responsibility of the DG Line through an annual review and update with the District 5230 Board of Directors, District Leadership and Club Presidents\*\***

Updated:  
2/17/2021  
4/7/2021  
4/27/2022