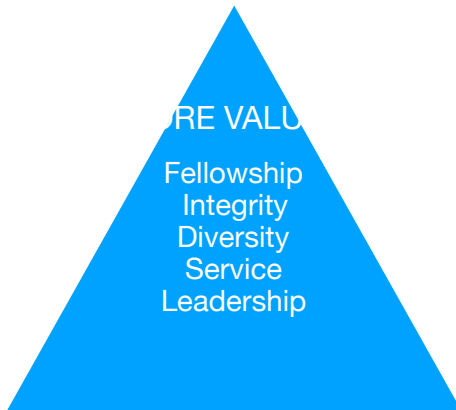


District 5420
STRATEGIC PLAN
January 16, 2016

**STRATEGIC
PLAN**
UTAH ROTARY
July 2016-June 2019

VISION 2020

Strong clubs of inspired, effective leaders committed to growth through collaboration, innovation and diversity.



PRIORITIES

Club Support: To promote a collaborative community among clubs, within the District, and the greater world of Rotary.

Leadership Growth: To prepare Rotarians to fulfill Club and District Leadership roles resulting in personal growth that adds value beyond Rotary.

Relevant Communication: To increase awareness and ensure the District, Clubs and members have access to use and share relevant information to promote public image.

WHY WE HAVE A STRATEGIC PLAN?

Any successful organization has a plan illustrating where they want to be in the future and how to get there. The Strategic Plan keeps district on track to meet our most important goals while preventing the tendency to change course when new leaders take office.

The Strategic Planning Initiative is instituted for the following reasons:

- Compliance with RI requirements
- To create direction for the future that is comprehensive, actionable and respectful of rotarian input
- Optimize resources for growth in membership through the development and nurturing of healthy clubs
- Provide continuity in the district and its clubs as leadership changes annually
- Provide long term direction while allowing for annual reviews that tweak that direction for changing environmental needs/new RI requirements
- Reduce district vulnerabilities and dependencies on any individual volunteers

The desired result of this initiative was:

- A 4 Year Strategic Plan finalized and formerly adopted by January 16, 2016.
- A living document embedded into the day to day operations of all District initiatives.
- A visual dashboard to easily track all performance indicators and implementation progress.
- A clear understanding and buy-in to be fully embraced and adhered to by all District leaders

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OBJECTIVES

- Assure continuity and continuous quality each year in district leadership.
- Verify activities, programs, policies and procedures adhere to the 4 Way Test and Core Values of Rotary: Service, Fellowship, Diversity, Integrity and Leadership.
- Actively seek and leverage the time, talents and resources of District Rotarians.
- Align District infrastructure to be relevant in the diverse needs of the Clubs.
- Foster and promote annual planning in budgets, calendars, Club goals and District activities.
- Seek to provide consistent information internally and externally to support the image of Rotary throughout our community. (Website, Newsletter, Social Media, etc.)
- Improve public image and awareness of Rotary.
- Actively seek Rotary activities to attract diverse new members.
- Seek to increase women's membership and leadership opportunities.
- Encourage recruitment of new members under forty.
- Actively promote Service, Fellowship, and Fun as an important component of healthy, active, and growing clubs.

OBJECTIVES

- Actively promote the clubs opportunity to experience Club Visioning and Rotary Leadership Institute.
- Encourage and support club sponsored youth programs; RYLA, Youth Exchange, Interact and Rotaract, as an opportunity to expand Rotary Service, and develop future Rotarians.
- Encourage the use of resources available through Rotary International, the Zone, other Districts and our district clubs, to engage Rotarians and increase retention.
- Ascertain and build on the skills and strengths of District Rotarians through Rotary experiences and leadership development training. Rotary Leadership Institute.
- Actively promote 100% participation of all Clubs and their members in contributing to The Rotary Foundation (TRF).
- Design, deliver and continually improve district provided service to member clubs.
- Assure President Elect's and/or President Nominee's are empowered to promote District and RI events and opportunities.

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STRATEGIC GOALS

CLUB SUPPORT

- Grow district membership by 5% of previous years final number, assisting all Clubs to be over 20 members each.
- Tutor AGs on how to support and increase membership for clubs with under 20 Rotarians.
- Support and publicize successful club projects.
- Develop and implement an effective platform (including AG's) to increase collaboration and sharing of resources among Clubs and with other Districts and RI.
- 100% club and member contribution to TRF.
- 100% club participation of District Grant funds annually.
- 100% club participation of Global Grant funds annually.
- 40% of District Rotarians attending at least one district event.
- Establish opportunities for business and social interactions through common interest groups.
- Develop a Speakers Directory for Club Programs.
- Grow Paul Harris Society each year at not less than 1% of district membership.
- Add one club each year.
- Stabilize and increase number of Interact and Rotaract clubs each year.

LEADERSHIP GROWTH

- Support our training team to be able to deliver leadership and Rotary Training on a more localized basis.
- Determine the training schedule for each Rotary year 15 months in advance completed by March 31.
- Provide relevant Rotary training, enhanced by online options, that is easily accessed by all members; to be completed by: March 31 for AGs & Club Presidents and before April 30 for all Club Officers.
- Create clear expectations for District leadership roles and strengthen the recruitment/selection process to better utilize the skill of Club Rotarians.

MEASUREMENTS

CLUB SUPPORT

- Monthly membership report, clubs under 20 to grow
- AGs submit quarterly report to District
- Club service / fundraising projects publicized on the website
- Percentage of members contributing to TRF
- AGs to meet with Club Presidents monthly
- Publish speakers directory for club programs on District website
- Net growth 5 Interact clubs per year, Rotaract 1 per year and retain current clubs
- 100% club and member contribution to TRF.
- 100% club participation of District Grant funds annually.
- 100% club participation of Global Grant funds annually.
- 40% of District Rotarians attending at least one district event.

LEADERSHIP GROWTH

- District Membership Trend
- Average Club Size
- Percentage of club leaders attending District Assembly, PETS and Conference.
- Percentage of clubs with 3 year Leadership succession plan
- Reinforce our team of AGs with relevant training by March of each year to be able to deliver leadership and Rotary Training on a more localized basis.
- Determine the training schedule for each Rotary year 15 months in advance by March 31.
- Provide relevant Rotary training, enhanced by online options, that is easily accessed by all members, to be completed by March 31 for AGs & Club Presidents and before

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- Have quarterly RLI classes (min 15 students) at all levels. (90 attendees per year = 5%).
- Create leadership development program that will add value to Rotary membership by 2020
- 20% of clubs participate in Club Visioning annually
- New members come to Rotary Boot Camp at Assembly and District Conference.

RELEVANT COMMUNICATION

Establish and maintain communication team of at least 5 members.

- Each club to submit to newsletter editor one article to publish each year.
- Consistent and current communication internally and externally through the District website and newsletter.
- 100% of Rotarians entered in to membership database providing a complete pictorial directory which includes skill sets and experience.
- Package PR & Communication resources to support Clubs in their public image awareness.
- Enhance district use of Social Media.

April 30 for all Club Officers.

- Create clear expectations for District leadership roles and strengthen the recruitment/selection process to better utilize the skill of Club Rotarians.
- Have quarterly RLI classes (min15) at all levels. (90 attendees per year = 5%).
- Create leadership development program that will add value to Rotary membership by 2020.
- 20% of clubs participate in Club Visioning annually

RELEVANT COMMUNICATION

- Number of Press Releases in Local Communities
- Number of District Leader Programs at club
- Average percentage Response to links to Website

RENDER AN ACCOUNT

- Render an account for performance regularly
- Help others continuously progress
- Represent the truth clearly and accurately
- Hold self and others accountable
- Express appreciation for accomplishments

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PURPOSE

To empower and develop Clubs, connecting rotarians to each other and the world of Rotary.

The Strategic Planning team met October 10, 2015 to finalize work on District 5420's Strategic Plan for July 2016 through June 2020.

The committee consisted of the following:

Penny Atkinson	West Jordan
Jim Bromley	Salt Lake
Wally Brown	Sugar House
Bev Christy	Dixie Sunrise
Glade Hamilton	Cedar City
Dave Higginson	Roosevelt
Shaun Michel*	South Jordan
Brett Mickelson	Park City
Bruce Parsons	Murray
Tom Powell	Provo
Chris Simonsen	Bountiful
Steve Skinner	Cache Valley Morning
Jerry Summerhayes*	Murray
Gilbert Trujillo*	St George
Hal Weight	Sugar House
Mike Wells	Tooele

Annual Review October 21, 2017

Bev Christy	Dixie Sunrise
Glade Hamilton*	Cedar City
John Hanahran*	Park City
Scott Leckman	Salt Lake
Devin Thorpe	Salt Lake

Future Scheduled Reviews

Annual Review	October 2018
Major Review	October 2019
Completed by	January 2020