



STRATEGIC PLAN

2020-2023

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

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



Focus and increase humanitarian service

- Eradicate polio
- Train members and encourage sustainable service focused on programs and activities that support youth, young leaders, and Rotary's six areas of focus
- Encourage collaboration and connection with other organizations
- Encourage significant projects both locally and internationally
- Educate and promote awareness of the work and value of The Rotary Foundation
- Encourage clubs to set and attain giving goals to The Rotary Foundation



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

Rotary brings together community members who step forward to take on some of the toughest challenges in their communities and the world.

ROTARY DISTRICT 5100 OFFICE

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Wed. 9:00 am - 11:00 am

 [Facebook.com/Rotary District 5100](https://www.facebook.com/Rotary-District-5100)



Profile

District Governor: Jo Crenshaw

District Governor Elect: Jim Boyle

District Governor Nominee: Steve Williams

District Governor Designate: Renee Brouse

This document is a companion to the Strategic Plan 2020-2023 and includes District Governance and actions for the Governance Team to support the clubs in achieving their goals. We have identified a specific need to focus on building club leaders that are willing and able to advance to District leadership positions. The Governors Team will receive quarterly updates and will assess progress made at the annual Governor team retreat and adjust as needed for the following year.

Summary

Governance, Leadership and Training	
Goals and Objectives	Strategies
<p>Ensure continuity and succession planning among District leadership.</p> <p>Responsibility: Governors Team</p>	<ul style="list-style-type: none"> Identify and publicize desired qualifications and select each Governor candidate with those qualifications in mind. Advance notice of Governor qualifications should be shared with potential leaders throughout the District. G-Team meets on a regular basis, at least monthly, to take action on current issues, plan for future needs, and provide ongoing communication. G-Team meets monthly with the Assistant Governors to maintain open lines of communication. Provide annual and ongoing training for AGs to develop leadership skills and improve effectiveness. Meet with committee chairs on a regular basis, provide ongoing communication and training. Identify and encourage potential leaders to fill future leadership roles; provide them with opportunities for growth and development. Positions include DG, AGs, Committee Chairs, and key District officer positions. As the District identifies potential leaders, ensure that we view all potential candidates through a lens of Diversity, Equity, and Inclusion. Publicize District Leadership positions with the membership via District website and newsletter. Contact outgoing club Presidents to review opportunities for growth and leadership at the club and District levels.
<p>Responsibility: Governors Team, Rotaract Leadership and Membership Chair</p>	<ul style="list-style-type: none"> The District will convene a Diversity, Equity, and Inclusion (DEI) Task Force to support the clubs and the District to reflect our communities, as well as Rotary International's statement on DEI.

<p>Train club officers in the tools for annual planning for budgets, calendars, club goals and District activities designed to support their clubs.</p> <p>Responsibility: Learning and Development Committee</p> <p>Responsibility: Training Team, AKA Learning and Development Team</p>	<ul style="list-style-type: none"> • Provide Training for club leaders. Training to include Pre-PETS, PETS District Sessions, and other identified training venues. Ensure that all Presidents-Elect attend. • Provide a variety of relevant training courses at the Rotary Spring Training Event and encourage all members to attend, with a goal of 15% participation. • Utilize virtual training opportunities to supplement traditional training events. • Use Rotary Essential Enrichment Learning (REEL) to provide training for membership; encourage participation and promote it to the members. • Make use of the Zoom virtual training tool to make Membership, Public Image, Grant Management, and Rotary Essential Enrichment Learning (REEL) more available to outlying regions. • Educate club leaders regarding the resources of people on district committees available to them. • Support clubs with training tools, resources, and activities to enhance and increase their knowledge and openness to DEI.
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<p>Encourage all clubs to have a five-year plan and update it annually</p> <p>Responsibility: Governors Team</p>	<ul style="list-style-type: none"> • Encourage clubs to complete a Vision Facilitation exercise and review it annually. (Use Visioning Team) • Encourage clubs to develop Business Plans and review annually. (Use PDG and other District resources) • Make assessment and planning tools available to club leaders, e.g., Seven Signs of a Thriving Club, Strategic Planning, Vibrant Clubs, etc. (Use PDG and other District resources) • Clubs will include DEI in their Strategic Plan.
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Administration

<p>Ensure proper policies are in place for sound fiscal management and operations efficiencies.</p> <p>Responsibility: Governors Team</p>	<ul style="list-style-type: none"> • Reference Rotary International Constitution and Bylaws for compliance. • Reference District Policy Manual for Compliance. • Reference Crisis Management Document. • Continue to employ a part-time Executive Assistant at the District Office.
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<p>Ensure that the District uses the latest technology available to us.</p> <p>Responsibility: Governors Team</p>	<ul style="list-style-type: none"> • Train District leaders and Committee Chairs in the effective use of virtual meeting technology. (Use Learning and Development Committee and Technology Group) • Provide consistent, current, and appealing communications strategy to District leadership and club members to build and promote a positive image of Rotary throughout the District. (Use Public Image Committee)
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<p>Ensure clubs are compliant with RI policies and are using current tools.</p> <p>Responsibility: Governors Team</p>	<ul style="list-style-type: none"> • Train and encourage clubs to use Rotary Club Central to enter, update, and track goals regularly. (Use Learning and Development Committee) • Train and encourage clubs to use the RI Direct tool and the Rotary Learning Center. • Encourage clubs to review their bylaws and constitution for compliance with Rotary International and update as needed. (Use PDG Larry Hatch to assist) • Ensure clubs are current with RI and District dues. (Use AGs)
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Rotary District 5100



2020-2023 District Membership Plan

Profile

District Governor: Jo Crenshaw

District Governor Elect: Jim Boyle

District Governor Nominee: Steve Williams

District Governor Designate: Renee Brouse

Membership Chair: Dennis Long

This document is a companion to the Strategic Plan 2020-2023 and includes District Governance and actions for the Governance Team to support the clubs in achieving their goals.

Background History

District 5100 has been challenged to achieve positive membership growth in any of the last 5 years. We have on average lost one club per year (either terminated or moved to another district) and we will focus on new and innovative club development over the next three years.

Although the district has added many new members (on average over 400 per year in each of the last 5 years), we have not been able to retain members. We did implement a Sustainable Rotary Club Project that resulted in 23 clubs focusing on membership. These clubs were relatively successful in growing their clubs' membership, but retention continues to be a challenge. Specifically, new members with less than 2 years in Rotary have left at alarming rate of over 30%.

On a positive note, young professionals (defined as 40 years of age or younger) comprise over 10% of the total membership of the district and this is twice the national average. We will leverage this strength in recruiting and developing leaders.

Goals and Objectives	Strategies
Strengthen and Support Clubs Responsible: The DEI Task Force and the District Membership Committee	<ul style="list-style-type: none">• The District will develop a mentoring program and new member orientation program to increase new member retention to 90% over their first two years.• The District will survey club membership chairs (Satisfaction, Health of your club, Finding new Members) to discover their club's most pressing membership issue and develop an individual club membership plan to help them achieve their goal(s).• The District will develop a young professional council who are passionate about Growing Rotary.• The District will review and analyze the diversity of the District as it compares to the population of our communities.• The District will offer support to clubs for training, resources, assessment tools, and speakers to ensure members have opportunities to learn and enrich the Rotary experience through the DEI lens.
Build Relationships	<ul style="list-style-type: none">• Coordinate and facilitate annual club satisfaction surveys and health surveys through Club Membership Chairs.

	<ul style="list-style-type: none"> • The District will assist clubs in developing creative ideas for existing member engagement and retention resulting in 90% current retention rates. Some of the programs and ideas include: <ul style="list-style-type: none"> ○ We Care Program ○ Buddy System ○ Socials/Happy Hours/Firesides ○ Rotary Story
Start New Clubs	<ul style="list-style-type: none"> • The District will execute on its 3 Year Grow Rotary Plan by starting Rotary Clubs each year. New Rotary Clubs will be diverse and vary in types including: <ul style="list-style-type: none"> ○ Passport Clubs ○ Corporate Clubs ○ Cause Clubs ○ E-Clubs ○ Satellite Clubs ○ Rotaract Clubs ○ Interact Clubs
Increase Membership Awareness through Education and Training	<ul style="list-style-type: none"> • The District will coordinate District Chairs for Membership, TRF, Public Image and DEI Task Force in hosting a Vibrant Club activity annually. • The District will utilize video technology to conduct periodic membership training activities (Rotary Spring Training, membership minutes, and periodic communications)

Implementation

The Membership Committee consists of 7 individuals and each committee member will have responsibility for a portion of the initiatives listed above. Also, the District has assembled a Grow Rotary Committee who will work with the district membership committee focusing on new and innovative club development.

The District Membership Committee will be focused on New Member Retention and Orientation, existing member retention and engagement, and new club development. This trifecta approach will ultimately result in Growing Rotary through increasing member engagement and improving our ability to change and be flexible for our diverse and dynamic members.



The Rotary Foundation Plan 2020-2023

Profile

Leadership Team 2020-23

District Governor: Jo Crenshaw

District Governor Elect: Jim Boyle

District Governor Nominee: Steve Williams

District Governor Designate: Renee Brouse

TRF Chair: Tom Crozier

This document is a companion to the Strategic Plan 2020-2023 and includes District Governance and actions for the Governance Team to support the clubs in achieving their goals. Content from the previous strategic plan was reviewed, restated and enhanced according to current needs in District 5100. A district TRF profile showing high and low achievements in TRF for the last five years ending June 2016 inform the stated goals. We anticipate that each year we will assess our progress and adjust as needed for the following year.

Summary

Focus and Increase Humanitarian Service	
Goals and Objectives	Strategies
Train members and encourage sustainable programs that support youth and young leaders with a focus on Rotary's Seven Areas of Focus	<ul style="list-style-type: none"> • District must have an active education program for use of District Designated Funds and Global Grants to help clubs achieve their service goals. • Recruit and train Regional TRF specialist and AGs on grant resources available to clubs to help achieve goals.
Encourage significant projects both locally and internationally.	<ul style="list-style-type: none"> • Encourage clubs to use District Designated Funds to enhance their local projects. • Educate clubs on International Service projects available for their participation. • Encourage and assist clubs to participate in at least one project per year involving a global grant. These can be multi-club efforts with at least 50% of clubs participating. • Encourage collaboration and connection with other departments. • Create coaches for Global Grants.
Educate and promote awareness of the work and value of The Rotary Foundation	<ul style="list-style-type: none"> • Ensure the District has an active education program for all TRF levels of giving and recognition to assist clubs to achieve their goals. • Seek and collect from donors (long and short term) stories that show how donations have become a part of their giving culture.

Encourage clubs to set and attain giving goals to the Rotary Foundation	<ul style="list-style-type: none">• Identify and work with Zone Major Gift officer regarding major gifts, Benefactors and Bequest Society prospects.• Use the recognition program developed and where the Foundation Specialist are requested by clubs to recognize giving at specific levels.• Encourage participation in Every Rotarian Every Year, Paul Harris Fellow, Rotary Direct, Sustaining Members and the Polio Plus Society. Educate and provide up to date news on TRF.
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Rotary District 5100

Public Image Plan 2020-2023

Profile

District Governor: Jo Crenshaw

District Governor Elect: Jim Boyle

District Governor Nominee: Steve Williams

District Governor Designate: Renee Brouse

Public Image Chair: Diane Noriega

This document is a companion to the Strategic Plan 2020-2023 and includes District Governance and actions for the Governance Team to support the clubs in achieving their goals. Content from the previous strategic plan was reviewed, restated and enhanced according to current needs in District 5100. We anticipate that each year we will assess our progress and adjust as needed for the following year. The following updated plan for public image indicates that the District will continue to improve, enhance and increase our Public Image this year and beyond.

Enhance Public Image and Awareness	
Goals and Objectives	Strategies
Continue to support clubs' efforts to unify image and brand awareness. Responsibility: Governance team	<ul style="list-style-type: none"> • Allocate funds from the District budget to provide mini-matching grants for clubs to update/replace public image items to align with the latest RI guidelines. • Support clubs in the effective use of the latest social media methods of communicating with members, potential members and the community to promote their service, networking, and events.
Expand our reach into local and global communities. Responsibility: Public Image Committee	<ul style="list-style-type: none"> • District 5100 will work with local media to broadcast the PSA's developed by Rotary International. These PSA's can be used by clubs as well as the District. • Continue to keep the District website and social media current and relevant. • Explore the opportunities to create visibility in the region via billboard, signage on buses, Tri-Met, etc.
Provide for continuity in leadership Responsibility: Governance Team	<ul style="list-style-type: none"> • Ensure that every club assigns one or more individuals as photographer. • The District Public Image Committee has been formed with members taking on specific tasks to prepare them for future leadership of the committee. • Ensure that committee members assume responsibilities that will prepare them for future leadership of the committee.

<p>Encourage clubs to identify a Public Image chair or committee and develop an annual Public Image plan.</p> <p>Responsibility: Assistant Governors, Public Image Committee</p>	<ul style="list-style-type: none"> • Educate clubs that Public Image is different from Public Relations or Communication. • Provide easy access to resources for the club PI committee: <ul style="list-style-type: none"> ○ Lead Your Club: Public Relations Committee manual and job description ○ Public Relations Page of My Rotary ○ Rotary's Brand Center • Every club will have a Public Image Chair.
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