

Rotary

District 7780 Strategic Plan



Overview

District 7780 currently has 40 Rotary clubs and 1627 members in southern Maine and coastal New Hampshire.

Over the past seven years, the District has embraced the visioning process at the club level with a very active and committed Vision and Planning Committee and District-facilitated vision and "vision to plan" events. The process of club visioning and implementing strategic plans has allowed a number of clubs to set and realize multi-year goals and some have succeeded in reversing troubling trends observed in membership retention, engagement and development. Looking to bring their successful experiences to the next level, members often raised the question: "When will the District undergo visioning and develop its own strategic plan?"

This strategic plan is divided into four sections.

The first section details the opportunities and challenges and our approach to the vision and strategic planning process.

The second section identifies our goals, which we define as broad statements of our aspirations for our District.

The third section contains our objectives, as well as specific strategies identified during our visioning and planning, that should help us achieve those objectives. While a goal is an aspirational statement, our objectives are measurable and quantifiable steps that will help us reach our goal. The Strategic Planning Team will consider and evaluate the strategies identified during visioning and will determine which are viable options.

Finally, the fourth section, implementation, contains specific action steps that the District and Clubs will take to ensure we put the strategies chosen into actions needed to achieve our objectives. Implementation will specify who will be accountable for each action item, when it will occur, and how we will define success.

Opportunities and Challenges

The District Governor team, consisting of the current District Governor, District Governor Elect and District Governor Nominee, were united in their belief that development and implementation of a District-level, multi-year strategic plan would enable us to better serve the clubs and strengthen Rotary in our District.

- Membership in our District, as in most of North America, was shrinking. Beyond that, the median age of our membership had increased significantly. It was imperative to reverse these trends to keep Rotary strong and viable in the future. Subsequently, we chose Membership as a primary focus of our visioning/planning effort.
- We believed that Rotary was and is an incredible force for good in our communities and in the world. When we looked at what our clubs were accomplishing, we felt Rotary could sell itself to new members once we shared its message of service to others. Many clubs lacked the skills to embark on their own formal plan for PR. In our communities, we felt Rotary was often misunderstood by the general public. The District was well positioned to promote its Rotary clubs and to provide appropriate resources to help the clubs promote themselves. For these reasons, we chose Public Image as another primary focus area of our visioning/planning effort.
- For Rotary to succeed and grow, we knew we needed to identify and develop strong leaders who would be willing and able to serve not only their own clubs but also at the District level. Some clubs were having success filling leadership roles while others struggled to fill key leadership positions necessary for their success and growth. For this reason, we chose Leadership Development and Succession Planning as the third primary focus areas of our visioning/planning effort.
- We also felt the District was uniquely positioned to share best practices among the clubs, to provide training and blueprints for different roles and committees, and to act as a clearinghouse of ideas that might benefit our clubs. We felt that clubs, working together, could share information, help each other grow, create partnerships and become stronger. For these reasons, we chose Inter-Club Collaboration as the final focus area of our visioning/planning effort.

Approach

The District Governor, working in conjunction with the DG Elect, DG Nominee and the District Vision and Planning Committee (DVPC), chose four key focus areas for our first District visioning process, as outlined as outlined in the **Overview and Opportunities and Challenges** section.

Those areas were **Membership, Public Image, Leadership Development and Succession Planning** and **Inter-Club Collaboration**.

The DVPC created and offered a comprehensive survey to all District Rotarians. The District Governor championed the visioning process and over 30% of District Rotarians participated in the survey. The survey results are linked here: **Survey Results**

The DG team and the DVPC met to discuss the general themes, concerns and strengths the survey had identified and communicated key findings to the membership.

The District Vision and Planning Committee facilitated three visioning events at six week intervals in three locations: Portland, Maine on September 15, 2016, Portsmouth, NH on November 3, 2016 and Brunswick, Maine on January 15, 2017. The format followed the RI visioning process the Visioning Committee had utilized with individual clubs over the prior seven years, with a writing exercise tailored to the District. The team asked participants to envision themselves five years into the future and speak to what they felt had been accomplished.

Common themes emerged over the course of the visioning process, both for the District as a whole and for individual clubs. The summary results of the visioning sessions are linked here: **Visioning Results**

The DG team and the DVPC synthesized the goals and ideas generated into a working document as a starting point for a completed strategic plan. They identified District Rotarians who were willing to assist in the development and implementation of a District strategic plan. From this group, the District Governor, in consultation with the DG team and the DVPC, appointed a Strategic Planning Team.

The Strategic Planning Team sought input from the district membership chair and other club and district leaders, both past and present, as well as new Rotarians with a willingness to serve and share their perspective as they developed the plan.

The Strategic Planning Team kept the DG team apprised of its progress, recognizing that the DG team would need to approve the plan and that the ongoing support of the sitting DG would be needed to properly execute the plan. The Strategic Planning Team presented the plan to the DG team in draft form, which was commented upon and revised as recommended. The DG team will present a draft of the plan for review and comment to: (1) the District's Council of Governors (its past District Governors); and (2) the sitting Club Presidents. Once the comments are received and considered, the

Strategic Planning Team will present the DG team with a revised draft for its final review and adoption. Upon adoption of the plan, the sitting DG, either individually or through his or her designee, will communicate approved actions to implement the plan to leaders of the existing District committees that will be charged with implementing the plan.

The District will consider revising its bylaws to make a Strategic Planning Committee a standing committee. The new bylaw might provide as follows:

Goals

We aspire to be:

- A District of 2000 members and 45 clubs.
- A District led by strong district and club leaders working together to serve others.
- A District with our clubs well known by the public for the good work they do.
- A District that promotes inter-club collaboration and acts as a clearing house of ideas and best practices for our clubs, and that identifies, nurtures and shares our collective expertise and talent for the good of our organization and the people we serve.
- A District that shares expertise and sets an example for clubs to engage in long range strategic planning and leadership development.
- A District that better utilizes technology to help achieve the goals set for the District.

District Strategic Planning Committee

The District Governor, with the advice and consent of the DGE, DGN and DGND (if named) shall appoint a strategic planning committee to be composed of ___ members who shall serve three year terms with ___ members appointed each year.

In selecting committee members, preference shall be given to Rotarians skilled in one or more of the following areas: long-term planning, club and district leadership, RI and The Rotary Foundation, the five areas of service (Club Service, Vocational Service, Community Service, International Service and Youth Service), membership development and retention, public image and public relations, leadership development and financial management.

Membership also shall be selected to include a reasonable balance between the various geographic areas within the district. The committee shall meet at such times and places and upon such notice as may be determined by the District Governor and the chair of the committee.

The Strategic Planning Committee shall survey Rotarians and clubs not less than every three years in discharge of its duties to review and make recommendations to the DG team pertaining to the strategic plan; it shall develop, recommend and update a strategic plan for consideration by the DG, DGE, DGN and DGND (the DG team); and it shall undertake other duties assigned by the DG team to further strategic planning in the District. The chair and vice chair of the committee shall be appointed by the DG, with the advice and consent of the other members of the DG team.

MEMBERSHIP

Objective: Increase and Maintain Membership of the District at 2000 members with 45 Clubs

Utilizing these Strategies:

- 1) Implement an effective Mentor Program: Active coaching for new members learning principles of Rotary.
- 2) Improve engagement of existing members who wants to serve as mentors-Ambassadors of Rotary.
- 3) Open up service projects to the public and advertise them.
- 4) Utilize social media campaigns to target younger members.
- 5) Explore the role of satellite clubs and encourage their development when appropriate.
- 6) Achieve a critical mass for younger members-encourage 3-4 to join together and create peer groups.
- 7) Identify opportunities for development of new clubs, particularly in under-served areas of the district.
- 8) Reach out to past Rotarians to see if they are interested in returning to Rotary.
- 9) Identify and connect with alumni of Rotary programs to ask them to join Rotary.

Engaging and Retaining New Members -

Create an effective “Mentor Program” utilizing the skills and experience of existing members to help transition new members into Rotary. Mentors would be known as Ambassadors of Rotary:

- Empower District Membership Committee to create plan to work with all clubs to implement this strategy, including the creation of a prototype for clubs to use. There are clubs in our district who already use a mentorship program or have used it in the past. Guidelines would include principles of Rotary, member responsibilities, club history, advice on club activities and committees, and introduction to other members of the club.

- Challenge clubs to implement a mentor program incorporating the prototype and guidelines suggested by District Membership Committee.
- Ask each club to appoint a Club Membership Chair or Champion to oversee mentoring and to serve as a liaison to the District Membership Committee.
- Use special badges for new members for the first year in Rotary and have a mentor assigned to each new Rotarian.
- Create a Membership Champion position in each club to serve as liaison to District Membership Committee.
- Convene meetings of Club Membership Champions two times per year.

Who: DG, District Membership Chair, Club Membership Champions

Success Defined: 10 clubs have started a new member mentoring program by July 1st 2019

Attracting members to Rotary -

Open up service projects to the public and advertise them; utilize social media campaigns to target young members and invite them:

- Market our community service projects ~~for~~ to the general public and especially younger people to encourage their involvement; tie in the club's communications to the hands on project leader or committee.
- Create a calendar of events that we share on local media, in church bulletins and in other media such as Facebook events.
- Capture information on non-Rotarians who are involved in Rotary events; pass that info onto the club membership champion.
- Make sure there is an Ambassador of Rotary at all community service projects we do.
- Invite people who were involved in past events to future events.

Who: club communications or PR Chair, club community service project leaders, club membership champion

Success Defined: District Clubs are finding more ways to advertise and include non-Rotarians in their club events by July 1, 2019

Creating new types of Opportunities for Membership -

Explore the role of satellite clubs and encourage their development when appropriate. Identify opportunities for the development of new clubs, particularly in under-served areas of the district. Encourage the creation of new clubs by younger members:

- Survey current and past AG's to figure out geographic areas with a need for a new Rotary Club within the District.
- Encourage our clubs to consider other forms of meetings including virtual meetings.
- Consider starting after-work clubs, which may be more successful as new club opportunities for younger members as well as members whose daytime work schedule is not flexible enough to attend a lunch or breakfast meeting.
- When building new club opportunities, consider option of no meals at meetings, especially after work meetings, to make membership cost less expensive, especially for younger members; food, if available, can be at member's own cost.
- Create and promote a "How to Start Your Own Rotary Club" kit; if one already exists, find it and make it more accessible and user friendly.

The District Membership Committee facilitates idea sharing, discussion and best practices for membership growth -

- Communicate what's working and what isn't with the clubs by holding a membership meeting for the clubs in three different locations throughout the District at least once a year.
- Promote the opportunity for clubs to create a business membership if they so choose; sell the networking aspect of Rotary as well as the service aspect.
- Approach businesses with a culture that is service oriented and invite them to join Rotary.
- Collect and disseminate success stories via social and traditional media.

Welcoming back past members of Rotary and its programs -

Reach out to past Rotarians to see if they are interested in returning to Rotary and identify and connect with alumni of Rotary programs and ask them to join Rotary:

- Create a "Welcome Back" program for people who left Rotary because they were not involved enough, their lives were too busy at that time, they had job pressures, or for other reasons beyond their control.
- Utilize the mentorship program and Ambassadors of Rotary to get past members back and re-energized about Rotary.
- Give each returning Rotarian a set of actionable items through the mentorship program.

- Suggest that Clubs set money aside in the club budget for a “class of 2017 service project”, and let the new Rotarians from a given year have their own small budget to devise and carry out a plan; recognize their efforts!

Recognizing our efforts -

Create a Governor’s Challenge:

The club with the largest % growth in membership has the trophy for that year.

When: July 1, 2019

Who: District Governor led and facilitated by the District Membership Committee, with input from AG’s and other seasoned members. Consider creating ad-hoc Club Expansion Committee to focus on new club development.

Success Defined: 2 new clubs by 2020, 5 new clubs by 2022. District membership of 2000 by 2022.

LEADERSHIP DEVELOPMENT

Objective: Identify and develop strong District and Club leaders (period at end?)

Utilizing these Strategies for the Clubs:

- 1) Provide District-initiated training and job descriptions for club officers including the President, Secretary, Treasurer and Foundation Chair.
- 2) Adopt strengths-based leadership assessment to better match strengths to needed positions.
- 3) Create a Leadership Academy or utilize Rotary Leadership Institute to identify and mentor new leaders.
- 4) Provide online classes via a Rotary classroom that explains “how to” on a variety of topics.
- 5) Provide District mentor for club leadership track.

Utilizing these Strategies for the District:

- 1) Implement a five year plan for mentoring potential district leaders.
- 2) Develop an online handbook for all District committees with job descriptions for all chairs readily available.
- 3) Create and administer a District-wide leadership questionnaire to create a pool of interested candidates.
- 4) Consider and explore options for creating a District board of directors or advisory board.

Identify and develop strong District and Club leaders -

The District provides training and job descriptions for club officers including the President, Secretary, Treasurer and Foundation Chair:

- Make an effort to inform clubs about the resources, including training and job descriptions, that already exist and are available from the District, often available on the District website.
- Encourage clubs to share job descriptions, customized to club size, with members before people are ready to assume a title as a passive resource.
- Suggest that clubs provide these materials to club members who are mentoring their own members or recruiting prospective members.

Adopt strengths-based leadership assessment to match strengths of Rotarians to those needed for the position:

- Develop a District–endorsed strengths-based leadership assessment tool.
- Promote the tool to clubs to use in identifying potential leaders by matching skills to jobs
- Encourage club leaders to use the assessment process to coach and mentor club leaders.
- Mentor our hard working volunteers.

Identify and mentor new leaders via a Leadership Academy or Rotary Leadership Institute:

- As a District, promote attendance at the Rotary Leadership Institute (RLI) to provides important and valuable information for developing future leaders.
- Consider creating an annual District Leadership Academy to provide further leadership training opportunities for Rotarians. This training, which could be modeled on successful programs such as RYLA would address the unique challenges inherent in managing and motivating volunteers and I endeavor to offer creative solutions and strategies.
- As a District, evaluate how training is offered, the time commitment required, geographic constraints, ease of contribution, and the need for quality participants as part of an effort to help the clubs grow and expand their leadership base. The overall goal will be to increase the pool of capable leaders.

We will offer online classes via a Rotary Classroom that explains “how to” on a variety of topics:

We will look to the technology committee to create training materials and to share trainings done at District Assembly and other Rotary events, posting the content to the online classroom.

Make Available to Clubs a District Mentor for club leadership track:

- Develop a five year plan for mentoring potential district leaders.
- Appoint a District Mentoring Champion to help establish a successful plan for mentoring at the club and district level.
- Assess the role of the District Trainer and the types of training currently offered; determine what other kinds of training could be implemented to assist clubs in future club leadership development.

Who: District Training and District Technology Committees working with District Leadership and Club Leadership

Success Defined: District leadership and training have investigated the options suggested by the Strategic Plan and 50% of district clubs have future club officers participating in new training and leadership development opportunities by July 2022

Explore a District board of directors or advisory board so that future District leaders can rise through the ranks by demonstrating their skills and experience, similar to what occurs at the club level:

- Research whether a board of directors or board of advisors is a feasible option to provide a launching pad for new leaders to emerge, to increase feedback and discussion from the clubs to District leadership and help bring leaders up through the ranks towards District leadership.
- Explore what other Districts do and what the leadership structure and membership makeup might be, possibly including the head Assistant Governor, a current past president, two or three key committee chairs in addition to the District Governor track.

PUBLIC IMAGE AND AWARENESS

Objective: Create and Implement a Public Image and Awareness Plan, which improves visibility and recognition by the general public, to make clubs well known for the good work they do.

Utilizing these Strategies:

- 1) Provide PR templates and articles for clubs to access and use which better tell what Rotary is.
- 2) The District will pick a theme or cause each year that clubs within the District can choose to participate in if they would like the opportunity to collaborate with other clubs. The District will provide PR support and templates for the theme so that multiple clubs can unite and create a regional presence for our local community service efforts.
- 3) Act as a social media engine utilizing multiple channels and advertising the Rotary story.
- 4) Develop a PR handbook.
- 5) Create a strategic plan for marketing, updated yearly and including RI's new branding tools.

Telling the Rotary story-

Improve our visibility and recognition by the general public:

- The District, using resources from Rotary International and resources they create, will give the clubs training and access to PR templates, articles and videos they can utilize locally that will help tell the Rotary story.
- The District will encourage clubs to partner with business organizations such as the Chamber of Commerce so that local business leaders will be more aware of what Rotary is and what we can do in the community.
- The District will consider setting aside funds in the future to help clubs with PR and advertising. One idea worthy of further consideration: pick a theme each year that clubs within the district can choose to participate in, with the District PR Committee providing public image and awareness support via a "PR-in-a-Box" centered on the chosen theme. With multiple clubs participating and marketing efforts streamlined and consistent, it would create a greater impact and a regional presence for our local community service efforts.

Sharing best practices:

- The Public Image and Awareness committee will develop a PR handbook with detailed instructions on "how to" on a variety of PR topics, links to Rotary International resources, and guidance for club PR chairs to utilize including basics of setting up a website, and how to make it interesting.
- The District will include strategic planning for marketing in its yearly updated strategic plan and utilize Rotary International's new branding tools.

Who: DG, District Public Image and Awareness Committee with help from Technology Committee

When: By July 2019

COLLABORATION

Objective: Promote inter-club collaboration and act as a clearing house of ideas and best practices for clubs. Identify, nurture and share collective expertise and talent for the good of the organization and the people we serve. The District will support and encourage Inter Club Collaboration so clubs can work together on similar projects and fundraisers, for networking and social events.

Utilizing these Strategies:

- 1) Initiate a Passport Program- win by visiting other clubs or attending their activities during the course of the year.
- 2) Create an online database for all events district wide with proven fundraising ideas and tips.
- 3) Coordinate regional social activities.
- 4) Implement a plan as needed for club chairs to work with a corresponding District chair.

Rotary clubs working together -

The District promotes inter-club collaboration and acts as a clearing house of ideas and best practices for clubs to work together on similar community projects and fundraising, as well as for networking and social events:

- Create an online database for all events District-wide that individual clubs agree to share with proven fundraising ideas and tips included. The database will be managed and updated by a member of the technology team.
- Establish Private Facebook user groups to share information about annual fundraisers for clubs interested in holding a new event and looking for feedback as well as clubs currently engaged in them to share new information. The Technology Committee will survey the clubs to determine what activities and groups exist and set up categories for sorting the information as well as determining how much information to include. The Assistant Governors will assist by promoting the site and encouraging participation by the clubs. The technology committee will create a mechanism for adding new events and information from the clubs on a regular basis.

Coordinate regional social activities and encourage Rotarians to visit other clubs:

Start a “Passport Program” within the District- participants gather stamps by visiting other clubs or attending their activities during the course of the year. The District will appoint 2-3 people with interest in club collaboration to research it, define the details and present a plan to the District Governor team. See assistance from the Assistant Governors to publicize it.

Coordinate regional social activities between clubs with the Assistant Governors acting as liaisons between the clubs and helping to facilitate participation. The District will promote and encourage connecting with other clubs and publicize our success stories.

STRATEGIC PLANNING

Objective: Share expertise to help clubs engage in long range strategic planning and leadership development. The District and Clubs utilize a 3-5 year planning process to set and achieve long term goals.

Utilizing these Strategies:

- 1) Create a District Strategic Planning Committee as a new standing committee of the District.
- 2) Formulate a District Strategic Plan that includes S.M.A.R.T. goals and is shared with all Rotarians.
- 3) Identify leaders for key areas to implement the plan.
- 4) Support an active and strong District Vision and Planning Committee to help clubs with visioning and strategic planning at the club level, which supports the goals and objectives of the District.

Plan to succeed -

Share expertise to help clubs engage in long range strategic planning and leadership development:

Active and strong District Vision and Planning Committee helps clubs with visioning and strategic planning at the club level which supports the goals and objectives of the District.

The District and Clubs utilize a 3-5 year planning process to set and achieve long term goals:

- A District Strategic Planning Committee, as a new standing committee of the District, formulates a District Strategic Plan that includes SMART goals and is shared with all Rotarians.
- Every three years the Strategic Planning Committee will solicit input from District Rotarians and leadership to update the goals and priorities of the District and draft a new, updated plan.
- District leadership, committee chairs and others designated in the plan will assume accountability for focus areas and report regularly on their progress.
- The District will hold a meeting with the Vision and Planning committee, club presidents, club vision champions and anyone else who has interest to encourage the process and talk about results thus far.

Identify leaders for key areas to implement the District Strategic plan:

- Create a checklist for club Presidents and President-elects to help them identify and recommend members of their club to fill slots at the District level.
- Ask the clubs to suggest leaders to help fill open positions. District appointments will come from a leadership pool and the process is more transparent.
- Expand the role of the District Trainer to a District Training Committee.

Succession plan for all District Committees:

- Chair is recommended as a three year position with goals and objectives in writing, with an under-study who is in training to assume the role in place for at least one year prior to assuming the position. Succession planning is in place for all key roles. Detailed job descriptions are in place for all District positions including expected time commitment and access to past committee chairs for mentoring and assistance.

TECHNOLOGY

Objective: Become a District that better utilizes technology to help achieve the goals we set.

Utilizing these Strategies:

- 1) Create a District technology team
- 2) Survey to determine best practices used by other Rotary districts, and offer them to DG Team and potential users.
- 3) Develop technologies to address needs identified in the District Strategic Plan.
- 4) Develop technologies to address needs identified by other groups in the District.

Better utilize technology to help achieve the goals set in the District Strategic Plan -

Create a District Technology Team:

- Assemble a team of Rotarians with strength in the area of technology.
- Survey other Rotary Districts to determine best practices.
- The Technology team will determine which topics lend themselves to online training then create, edit and upload materials, with the ultimate goal to build a library of online training materials.
- The District will leverage the skills of a Technology team to create and disseminate internet training videos through the Learning Management System, free to us through Rotary International, or a dedicated YouTube site for District 7780 training and education without the time and expense of in person meetings.
- The technology team could also keep a database of resources for club and volunteers willing to help clubs with their web sites or other public facing social media.

Develop additional technologies to address needs identified in the District Strategic Plan and needs identified by other groups within the District:

- The District will establish private Facebook user groups for all club Membership chairs, Foundation chairs, Public Relations chairs, and other relevant committee chairs to allow for and encourage open communication and idea exchange.
- Each club chair will have access to a district chair for ideas, support and training as needed.
- The District will create an online database with information shared by the clubs for all events district wide with proven fundraising ideas and tips.