

Rotary

District 5320



Exceeding Expectations!

“Leading with Vision, Serving with Purpose”

Strategic Framework

This plan aligns directly with Rotary International priorities

Key Takaway

This is an **execution-driven strategy**, not just a vision:

Impact = Service + Storytelling + Funding

Engage = Experience + Leadership + Planning

Reach = Growth + Mentorship + Innovation

Adapt = Structure + Accountability + Sustainability

Rotary District 5320 Strategic Plan

Our Mission

As a District of Rotary International, we assist and support the Rotary clubs and the Rotarians of District 5320. Through principled, collaborative, and inspired leadership, we assist and support the leaders and members of our clubs as they unite to take action – creating lasting change in their communities, across the globe, and within themselves.

Our Vision

We model **Service Above Self**, placing service at the center of everything we do.

Our Commitments

We are committed to:

Aligning our Strategic Plan with Rotary’s Four Priorities: Impact, Reach, Engage, and Adapt.

Developing and empowering leaders to strengthen clubs and expand impact.

Supporting excellence in governance, membership, service, and public image.

Advancing meaningful service across community, vocational, and international avenues.

Encouraging dynamic, living strategic plans at the club level.

Promoting ethical fundraising aligned with Foundation standards.

Strengthening District programs (RYLA, Interact, Rotaract, Youth Exchange, Mental Health initiatives, and Grants).

Elevating Rotary’s visibility through storytelling and community engagement.

Building inclusive, diverse, and thriving clubs.

Enhancing District operations to better support clubs.

Implementation Roadmap

Planning Discipline

Start each Rotary year with a clear execution plan.

Align goals, budget, and leadership early.

Communication & Access

Centralize resources.

Improve clarity and usability.

Leadership Leverage

Strategically utilize experienced leaders.

Formalize District mentorship.

Consistency & Follow-Through

Schedule recurring annual reviews.

Build repeatable systems.



Exceeding Expectations!

ADAPT

(Governance • Strategy • Sustainability)

Strategic Goal:

Strengthen adaptability through governance, clarity, and strategic discipline and planning.

Key Focus Areas

SOP and role clarity.
Strategic planning process.
Transparency and accountability.

Key Initiatives

Governance Excellence

Update SOPs, SOWs, and roles.

Conduct annual governance audit.

Strategic Planning Culture

Host Annual Strategic Plan Review Seminar.

Encourage “living” club strategic plans.

Accountability & Transparency

Implement quarterly progress reviews.

Establish clear reporting structures.

Sustainability & Continuity

Document processes and leadership transitions.

Build systems beyond individual terms.

Research the potential for purchasing a building for operations and rental income.

Success Metrics

Completion of governance updates.

% of clubs with active plans.

Participation in planning processes.

Improved operational efficiency.

IMPACT

(Service • Foundation • Public Image)

Strategic Goal:

Increase the measurable impact and visibility of Rotary service.

Key Focus Areas

Website and resource accessibility.

Public image and storytelling.

Leadership leverage (Zone-level expertise).

Key Initiatives

Service & Project Development

Launch a District Project Incubator Program.

Provide templates and coaching for scalable projects.

Public Image & Digital Presence

Conduct website audit and optimization.

Create a centralized resource hub.

Develop a content calendar (stories, impact highlights).

Fundraising Excellence

Establish a District-wide fundraising strategy.

Train clubs in confident (“fearless”) fundraising.

Share best practices and case studies.

Engage

(Membership • Experience • Leadership)

Strategic Goal:

Enhance member engagement, satisfaction, and leadership development.

Key Focus Areas

Event experience and participation.

Fundraising engagement.

Budget alignment.

Early-year planning.

Key Initiatives

Member Engagement Strategy

Create annual engagement plans.

Standardize club experience best practices.

Continue and refine New Rotarian Receptions.

Ensure events are high-value and purposeful.

REACH

(Growth • Expansion • Inclusion)

Strategic Goal:

Expand Rotary’s reach through membership growth, diversity, and new connections.

Key Focus Areas

Leadership pipeline integration.

Professional mentorship.

Club innovation and expansion.

Key Initiatives

Membership Growth

Align growth with leadership programs.

Set measurable District targets.

Professional Mentorship Program

Launch District-wide mentorship initiative.

Connect Rotarians with emerging leaders.

Club Innovation & Expansion

Support satellite, hybrid, and cause-based clubs.

Strategic Partnerships

Engage experienced leaders for mentorship and training.

Align annual PR and marketing cycles.

Club President Impact

Strengthen DG–President connection.

Support leadership growth to build vibrant clubs.

Vibrant Club Indicators:

Active membership engagement.

Meaningful service.

Effective governance.

Strong public image.

Inspirational leadership.

Diversity, equity, and inclusion.

Success Metrics

Increased grant funding utilization.

Improved digital engagement.

Growth in fundraising totals.

Greater visibility of Rotary projects.

District Events

Increase participation in trainings and conferences.

Leadership Development

Expand leadership pathways and mentorship.

Integrate leadership into all District programs.

Funding Engagement

Set clear District fundraising goals.

Align giving with purpose and impact.

Success Metrics

Increase event attendance.

Improved retention rates.

Growth in leadership pipeline.

Higher member satisfaction.

Reach underrepresented demographics.

Community Integration

Strengthen partnerships with local organizations.

Increase visibility in professional networks.

Youth Program Growth

Expand Interact, Rotaract, and youth engagement.

Promote mentoring programs (e.g., middle school initiatives).

Success Metrics

Net membership growth.

Increased diversity.

Mentorship participation.

New club models launched.

Stronger youth program engagement.

Annual Goals

Membership Growth

___ Work with Membership Chair to develop plan for membership growth.

___ Set membership growth targets with input from club Presidents.

___ Give tools for membership growth to club presidents at PrePels, DTA and other training opportunities.

___ Organized two or three New Rotarian Receptions for the year.

Foundation Giving Growth

___ Establish giving goal with the District Foundation Chair.

___ Encourage clubs to set Foundation giving goals and put in My Rotary.

Responsible person:
District Governor

Implementation Roadmap

Planning Discipline

DEADLINE - December

- Start each Rotary year with a clear execution plan.
- Align goals, budget, and leadership early.

___ Meet with Governor line mid-year before taking over as Governor. Responsible person: DGE

___ Review Strategic plan with Governor line for any changes. Responsible person: Governor or appointed chair

___ Prepare District Budget based on Strategic Plan. Responsible person: DGE

Communication & Access

DEADLINE - January

- Centralize resources.
- Improve clarity and usability.

___ Meet with District staff to review plan and budget. Responsible person: DGE

___ Meet with key leadership to review plan. Responsible person: DGE

___ Meet with Presidents to review plan. Responsible person: DGE

Leadership Leverage

DEADLINE - February

- Strategically utilize experienced leaders.
- Formalize District mentorship.

___ Decided on key leader position in the District based on the Strategic plan. Responsible person: DGE

___ Organize District Training Assembly to focus on the Strategic plan goals. Responsible person: DGE

___ Work with PELs to plan education goals that train leaders. Responsible person: DGE

Consistency & Follow-Through

DEADLINE - March

- Schedule recurring annual reviews.
- Build repeatable systems.

___ Make plan available at District Committee meetings. Responsible person: District Governor

___ Ask key chairs to review and assess success of goals. Responsible person: District Governor

___ Set up District Calendar to reflect goal deadlines. Responsible person: District Governor