



**Planning for the Future**



# ROTARY: MAKING A DIFFERENCE



## **ROTARY INTERNATIONAL**

### **STRATEGIC PLAN**

### **PRIORITIES AND GOALS**

### **THE BASE FOR THE DISTRICT 7010 STRATEGIC PLAN**

Rotary's strategic plan provides the framework for our future, ensuring that we continue to be known as a respected, dynamic organization that advances communities worldwide.

The strategic plan evolves with the aspirations of Rotarians. It is shaped by regular input from members through surveys, focus groups, committees, and meetings, so it can continue to help us achieve our goals.



Rotary's strategic plan identifies three strategic priorities supported by 16 goals. They represent what Rotarians have asked to be done to ensure a strong and vibrant Rotary going into the future.

### ***SUPPORT AND STRENGTHEN CLUBS***

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

### ***FOCUS AND INCREASE HUMANITARIAN SERVICE***

- Eradicate polio
- Increase sustainable service focused on programs and activities that support youth and young leaders and Rotary's six areas of focus
- Increase collaboration with other organizations
- Create significant projects both locally and internationally

### ***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

## **OUR MISSION**

We provide service to others, promote integrity, and advance world understanding, goodwill, and peace through our fellowship of business, professional, and community leaders.

## **OUR CORE VALUES**

Our values are an increasingly important component in strategic planning because they drive the intent and direction of the organization's leadership.

These core values are:

### ***FELLOWSHIP AND GLOBAL UNDERSTANDING***

We build lifelong relationships.

### ***ETHICS AND INTEGRITY***

We honour our commitments.

### ***DIVERSITY***

We connect diverse perspectives.

### ***VOCATIONAL EXPERTISE, SERVICE, AND LEADERSHIP***

We apply our leadership and expertise to solve social issues.



**Building on the Rotary International  
Strategic Plan**

**DISTRICT 7010 STRATEGIC PLAN**

**VISION**

District 7010 empowers its **Clubs** to be strong and vibrant members of the Rotary community.

**CORE VALUES**

- |            |   |
|------------|---|
| SERVICE    | Fostering a culture of service to address the needs of others.                        |
| FELLOWSHIP | Building strong relationships between and within clubs and with the Rotary community. |
| DIVERSITY  | Valuing differences in age, ethnicity, vocation and interests.                        |
| INTEGRITY  | Living by the four-way test.  |
| LEADERSHIP | Modeling behaviour and fostering leaders.   |

## MISSION

To engage, educate and support District 7010 Rotarians and connect them to each other and the Rotary community.



## STRATEGIC PRIORITIES

- |                         |   |
|-------------------------|---|
| <b>New Generations</b>  | To enable younger generations as they grow and encourage them to connect with Rotary.   |
| <b>Membership</b>       | To attract, engage, retain and recognize a diversity of members in flexible, vibrant clubs.   |
| <b>Service projects</b> | To assist clubs in developing and implementing effective projects and to encourage local, national and international service through identifying opportunities and facilitating partnerships. |
| <b>Training</b>         | To strengthen our commitment to Rotary, nurture leaders, foster a stronger understanding of Rotary and build relationships.   |
| <b>Public Image</b>     | To enhance Rotary's public image, attract support by telling our Rotary story and build awareness of the strengths and power of Rotary to make the world a better place.                      |
| <b>Foundation</b>       | To enhance Rotarians' understanding of and commitment to the Rotary Foundation and optimize its use to meet Rotary's 6 areas of focus.  |
| <b>Administration</b>   | To be the "go to" resource to support clubs in implementing their goals and programs through enhanced communication.  |



## District Governor's Goals 2017 -18 "Be the One"



|   |  |
|---|--|
| Support and Strengthen Clubs            | <ul style="list-style-type: none"> <li>• Increase use of Rotary club central</li> <li>• Encourage more members to attend the R.I. Convention in Toronto</li> <li>• Engage members increase retention</li> <li>• Host a fun District conference</li> <li>• Assist clubs in starting electronic archives to preserve club history</li> </ul> |
| Focus and Increase Humanitarian Service | <ul style="list-style-type: none"> <li>• Sustain and build contributions to the Foundation</li> <li>• Have clubs participate with hands on international projects</li> <li>• Continue with district based project</li> <li>• Increase the amount of global grants</li> </ul>   |
| Enhance Public Image and Awareness      | <ul style="list-style-type: none"> <li>• Share the Rotary story</li> <li>• Optimize use of social media</li> <li>• Promote club based PI programs</li> <li>• Have clubs update their websites</li> <li>• Celebrate and identify those that have been the one to start a project or fund raiser that has inspired others</li> </ul>         |
| Youth                                   | <ul style="list-style-type: none"> <li>• Connect with youth</li> <li>• Have clubs and district invest in Rotaract</li> <li>• Partner with the YMCA to expand Interact</li> <li>• Increase the number of Youth Exchange students</li> <li>• Identify and Train Future Leaders</li> </ul>  |
| Polio                                   | <ul style="list-style-type: none"> <li>• Increase fun raising contributions to the End Polio now campaign</li> <li>• Host a district wide walk on Oct 24<sup>th</sup> to create awareness across the district</li> </ul>   |

### OBJECTIVES, GOALS AND TASKS

**1. New Generations: To enable younger generations and encourage them to connect with Rotary.**

|   |   |
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| <b>Director Margaret Walton (2017-18)</b> | <b>Budget for Committees \$4750</b><br><b>Program budget for RYLA and YEX \$91,000+/-</b> |
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| <b>DG's Goals</b>  |
| <ul style="list-style-type: none"> <li>• Foster Interact and Rotaract</li> <li>• Connect with youth</li> </ul> |

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| <b>Tasks</b>   |
| <p>Develop a coordinated strategy to ensure active participation in all areas of New Generations.</p> <p>Involve Interact, Rotaract, Youth Exchange, children (or grandchildren) of Rotarians in District conference to build the family of Rotary</p> <p>Provide support to promote the youth exchange programs.</p> <p>Support existing Interact and Rotaract Clubs and provide support to establish new ones.</p> |

| <b>Committee</b>  | <b>Chair</b>    | <b>Goal</b>  | <b>Action</b>   | <b>Timelin<br/>e</b> | <b>Status</b> |
|---|-----------------|--|---|----------------------|---------------|
| Director<br>Budget \$750<br>Total Committee<br>budget \$6750<br>Program budget<br>Youth exchange<br>\$68,000+/-<br>RYLA \$23,000=-/ | Margaret Walton | Co-ordinate<br>activities of<br>New Gen<br>Committees<br>so they<br>support each<br>other. | Ensure all are aware of and implementing and abiding by abuse and harassment policy.<br>Expand access to club runner for Interact and Rotaract.<br>Ensure there are engaged mentors for Rotaract and Interact clubs.<br>Promote Rotaract and Interact events on District calendar.<br>Share events and cohost conferences and training.<br>Promote all new generations programs across all programs. A member of Rotaract should be on the District PR committee. |                      |               |
| Interact<br>Budget \$750  | Debbie Deering  | Support/<br>maintain<br>existing club  | Maintain accurate contact information for all Interact Clubs<br>Strengthen web presence for Interact.<br>Contact Rotarian leads for Interact Clubs to share successes, projects, etc.<br>Forward relevant information from RI<br>Encourage promotion of their activities<br>Establish connections through a regular Go To Meeting<br>Share strategies for continuity (spring elections, Interactors to RYLA)<br>Have succession plans with Interact Chair         |                      |               |
|   |                 | Assist in  | Establish a template for establishing clubs in partnership with agencies such   |                      |               |



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|  |   | development of new clubs | <p>as the YM/WCA and promote across the District.</p> <p>Ensure there is an ongoing Rotary liaison for each Interact club.</p> <p>Investigate possibility of providing a club runner link for Interact.</p> <p>Maintain Interact section of District website with relevant information about Interact</p> <p>Be available for assistance whether in person, by phone or email</p> <p>Promote at Leadership training, Rotary Weekends and District Conference</p>  |  |  |
| <p>RYLA<br/>Committee budget<br/>\$750<br/>Program budget<br/>\$23,000 (+/-)</p>                                     | <p>Sebastien<br/>Vermette</p>               |                          | <p>Ensure all clubs are aware of and encouraged to send participants to RYLA.</p> <p>Work with other members of the New Generations Committee to promote Youth Exchange, Interact and Rotaract at RYLA.</p> <p>Encourage content regarding Rotary youth programs (Rotaract Interact, YEX STEP Scholarships)</p> <p>Investigate and promote other youth “Adventures in” programs.</p>  |  |  |
| <p>Rotaract<br/>\$1500</p>   | <p>Alex MacIntosh<br/>Katina Matheson</p>   |                          | <p>Integrate Rotaract and Rotary conferences but ensure there is a distinct program for Rotaract.</p> <p>Reduce registration fee for Rotaractors.</p> <p>Strengthen Rotaract program at Rotary weekend, make attendance by Rotaract presidents mandatory and promote to other Rotaractors.</p> <p>Provide support in fees and expenses(billets) for Rotaracts who attend Rotary weekend.</p> <p>Encourage Rotaract to post events on District calendar and use it as a reference.</p> <p>Integrate Rotaract into club runner.</p> <p>Establish a Rotaract south and north representative with person serving on DAC to rotate between south and north every 2 years.</p> <p>Investigate an Assistant Governor program for Rotaract.</p> |  |  |
| <p>Youth Exchange<br/><br/>YEX program<br/>includes STEP<br/>budget \$68,000<br/>(+/-)<br/><br/>Committee budget</p> | <p>Allison Durocher /<br/>Scott Negrych</p> |                          | <p>Investigate ways to reduce financial burden for smaller clubs participating in YEX.</p>  |  |  |

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| \$3000 |  |  |  |  |  |
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**2. Membership: To attract, engage, retain and recognize members in flexible, vibrant clubs.**

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| <b>Director</b> Lise Dutrisac 2017 -18   |              | <b>Total Budget \$5,000</b>   |               |                 |               |
| <b>DG's Goals</b>  |              |   |               |                 |               |
| <ul style="list-style-type: none"> <li>• Increase membership</li> <li>• Improve member diversity</li> <li>• Engage members</li> <li>• Create new models for Membership</li> </ul>  |              |   |               |                 |               |
| <b>Tasks</b>   |              |   |               |                 |               |
| <p>Strengthen the District membership recruitment, engagement and retention plan based on attracting all demographics and providing alternative meeting options that respond to a variety of needs.</p> <p>Help clubs do a community scan to identify and recruit potential members</p> <p>Encourage establishment of clubs with different profiles to accommodate more members.</p> <p>Establish alternate memberships to allow for flexibility in membership.</p> <p>Work with Membership Chairs to help them establish their goals.</p> |              |   |               |                 |               |
| <b>Committee</b>   | <b>Chair</b> | <b>Goal</b>   | <b>Action</b> | <b>Timeline</b> | <b>Status</b> |
| Lead<br>Budget \$600.00  | Lynn Chant   | <ol style="list-style-type: none"> <li>1..Help clubs establish membership recruitment and retention plans.</li> <li>2.Encourage clubs to recognize and award their members.</li> <li>3.Provide education on membership growth by providing materials/seminars.</li> <li>4.Provide flexibility in membership by establishing policies that help clubs attract and retain membership.</li> <li>5. Establish new clubs in previously untapped areas where feasible.</li> <li>6. Encourage clubs to increase the fellowship and fun within their club.</li> <li>7. Work with the District Membership committee to assist in their tasks.Help clubs establish</li> </ol> |               |                 |               |

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|  |                        | membership recruitment and retention plans.   |  |  |  |
| Membership Retention chair                       | Mitch Gravel           | The goal of member retention is to track the rate of retention of members in clubs throughout the District. This information will be passed on to the District Membership Director who will then share this information with the DAC to provide better understanding of why members leave Rotary.   |  |  |  |
| Club Extension Budget \$1000                     | Appointment pending    |   |  |  |  |
| Awards Budget \$1,200                            | Liz Moseberger-McInnis | <ol style="list-style-type: none"> <li>1. Provide Clubs with information on types of awards that are available to reward and appreciate club members.</li> <li>2. Monitor these awards throughout the year and make clubs aware of deadlines.</li> <li>3. Encourage Clubs to appreciate members by recognizing their work and dedication to Rotary on a regular basis.</li> <li>4. Purchase DG and PDG pins, plaques and gifts.</li> </ol>  |  |  |  |
| Family of Rotary Budget \$200                    | Louise Thompson        | The main focus currently is preparation of the memorial service for District Conference.  |  |  |  |
| Membership Recruitment Chair Budget: \$ 2,500.00 | Bill Montgomery        | <ol style="list-style-type: none"> <li>1. Help clubs establish membership recruitment/retention plans in order to encourage membership growth and stability.</li> <li>2. Help clubs establish retention plans to help them retain members and understand why club members leave Rotary.</li> <li>3. Provide education on membership growth by providing materials/seminars.</li> <li>4. Connect potential members sent from RI with appropriate clubs.</li> <li>5. Oversee the management of the Area Liaison committee (8 members representing the 8 Areas in the District) to ensure that these membership</li> </ol> |  |  |  |

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|  |  | representatives connect with clubs in their Area on a regular basis to provide further growth and education on membership. |  |  |  |
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**3. Service projects: To assist clubs in developing and implementing effective projects and to encourage local, national and international service through identifying opportunities and facilitating partnerships.**

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|------------------------------|--------------------------------|
| <b>Director:</b> Dawn Straka | <b>Total Budget \$3,625.00</b> |
|------------------------------|--------------------------------|

- DG's Goals**
- Establish a District based international project
  - Identify and celebrate local club projects and programs
  - Support club based international projects involving partnerships and travel

**Tasks**

Have each Committee identify a project in their area of focus that could be implemented by the District (with club participation) or which could be a prototype for clubs to use in their communities.

Provide an opportunity for sharing project ideas between clubs and members.

Assist clubs in developing and implementing local projects

Implement District projects to draw Rotarians together

| Committee                | Chair               | Goal  | Action | Timeline | Status |
|--------------------------|---------------------|---|--------|----------|--------|
| Lead                     | Dawn Straka 2014-18 | Continue to give leadership, guidance and support to the Service area Chairs.<br>Orient new Chairs as they assume their roles.<br><br>Continue to give leadership to the District 7010 International Project's Advisory Committee and to the selected International project.<br><br>Continue to pull together 3-4 District Service reports per Rotary year. |        |          |        |
| Community Service Budget | Shelly Duben        | Develop District Community Service project.   |        |          |        |

|                                       |                 |  |  |  |  |
|---------------------------------------|-----------------|--|--|--|--|
| \$200                                 |                 | <p>Introduce District Community Service Projects at Rotary Weekend.</p> <p>Encourage all clubs to participate in the District Community Service Project through email blast to club presidents and community service chairs, website &amp; Rotary weekend.</p> <p>Provide an explanation to chairs about Rotary Showcase and encourage them to share their projects online.</p>  |  |  |  |
| Indigenous Focus Budget<br>\$1,125.00 | Don Watkins     | <p>To connect with a member from at least 15 District Clubs at the 2017 Rotary Weekend.</p> <p>To obtain the names of members of at least 10 District Clubs willing to continue the discussion about meeting with a leader of their neighbouring First Nations community.</p> <p>To support the Club representatives to consider the implementation of the Adventure in Understanding Template in a form suitable for their locale.</p> <p>To encourage the planning for at least 5 new locations for the program in the summer of 2018.</p> |  |  |  |
| Vocational Service<br>\$200           | Natasha Lokshin |  |  |  |  |
| World Community Service<br>\$200      | Lynn Vuorimaki  | <p>Will create a list of projects existing in the District, in trying to become familiar with the opportunities.</p> <p>Will move into finding new projects.</p>   |  |  |  |



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|  |  | Will continue to serve on the District 7010<br>International Project Advisory Board. |  |  |  |
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**4. Training: To strengthen commitment to Rotary, nurture leaders, foster a stronger understanding of Rotary and build relationships**

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|--|--------------|--|---|-----------------|---------------|
| <b>Director Lynne Chant (2017-20)</b>  |              |  | <b>Budget \$46,700</b>  |                 |               |
| <b>DG's Goals</b>  |              |  |   |                 |               |
| <ul style="list-style-type: none"> <li>• Maximize participation in training</li> <li>• Identify and trail future leaders</li> </ul>  |              |  |   |                 |               |
| <b>Tasks</b>   |              |  |   |                 |               |
| <p>Implement a program to identify and train future leaders for District positions based on a succession plan.<br/>         Use DTTS to build a unified team with common goals for the year<br/>         Focus on Rotary weekend to engage all Rotarians<br/>         Use District conference as an inspiration to educate and engage all Rotarians<br/>         Promote RLI<br/>         Encourage participation in International convention as a way of educating and inspiring leaders.</p> |              |  |   |                 |               |
| <b>Committee</b>   | <b>Chair</b> | <b>Goal</b>  | <b>Action</b>   | <b>Timeline</b> | <b>Status</b> |
| District Trainer<br>Budget \$ (+/-)  | Sue Davidson | <p>Increase awareness and understanding of the different programs to enhance Rotary understanding and knowledge.</p> <p>Develop and implement comprehensive plan to support clubs in meeting club and district goals including DTTS and Rotary weekend goals</p> <p>Co-ordinate Rotary Weekend</p> <p>Develop and implement programs to train and encourage future leaders</p> | <p>Develop flyer to define RLI, RLA, Rotary Weekend and Rotary 101</p> <p>Promote programs, emphasizing opportunities to strengthen fellowship and friendship</p> <p>Work with AGs and Directors to determine club and district needs</p> <p>Assist with visioning, efficacy scales, informal assessments</p> <p>Promote Rotary Weekend, RLI, RLA and Rotary 101</p> <p>Work with Rotary International Coordinators and District Leadership Team to provide training seminars (face to face and online) to respond to club needs and support achievement of goals</p> |                 |               |

|   |                               |   |   |  |  |
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|   |                               |   | <p>Establish process to promote and select for district positions</p> <p>Offer Future Leaders' workshop at Rotary Weekend</p> <p>Make Rotarians aware of criteria for candidates to send to Future Leader Seminar at Zone</p> <p>Develop DTTs program to further facilitate team building and leadership skills</p>   |  |  |
| <p>Learning Academy</p> <p>Budget</p> <p>Budget \$250</p>   | Janet Morzuk                  | <p>Develop and implement programs to train and encourage future leaders</p>   | <p>Promote RLA to all members (specifically targeting new Rotarians)</p> <p>Provide alternate processes to complete modules</p> <p>Recognize/celebrate graduates at Rotary Weekend</p> <p>Work with District Translator to offer material in French</p>   |  |  |
| <p>Rotary Learning Institute</p> <p>Total Budget \$2,150.00</p> <p>\$1,000 to cover committee expenses</p> <p>\$1,000.00 to develop and translate French language materials</p> | Lynda Rickard                 | <p>Increase the number of District Rotarians that have completed RLI Training by 10%</p> <p>Offer Part 1 in French and English.</p> | <p>Deliver Parts 1, 2 and 3 of the Rotary Leadership Institute training annually.</p> <p>Pilot project to present training in four quadrants of the District</p> <p>Work with the District translator to develop or order French Language materials</p> <p>Facilitate the training of bilingual institute leaders</p> |  |  |
| <p>Logistics</p> <p>\$1,000 lap top</p> <p>\$200.00 for office</p>  | Bill Hagborg<br>(2016 – 2019) | <p>Provide timely administrative support (including online</p>  |   |  |  |

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| supplies and paper  |                | registration) for all district training   |   |  |  |
| College of Knowledge  | Joyce Campbell | Provide current/relevant Rotary information to share at the club level and Rotary Weekend<br><br>Offer a comparable resource in French  | Update materials yearly and send to webmaster to post on the website<br><br>Work with the district translator to translate the resource |  |  |
| Club Intervention /Visioning<br>Total Budget \$2,850.00<br><br>\$500 for translation<br><br>\$250-Survey monkey<br>\$100 office materials | Len Lifchus    | 14 clubs will go through the visioning/strategic planning process in the 2017-18 year<br><br>Two thirds of the clubs will be on "strategic planning cycle"<br><br>To have French language facilitators<br><br>Streamline process<br><br>Provide support to struggling clubs |   |  |  |

**5. Public Image: To enhance Rotary’s public image, attract support by telling our Rotary story and build awareness of the strengths and power of Rotary to make the world a better place.**

**Director: Elizabeth DeGroot 2017-18** **Budget \$5,750**

**DG’s Goals**

- Develop and implement a District wide campaign to showcase Rotary
- Optimize use of social media
- Promote club based PI programs
- Host a Friendship Exchange

**TASKS**

Develop and implement a District Image Campaign to raise Rotary’s profile amongst both members and the public.  
 Provide support and draw on RI resources to help the clubs do local PR campaigns  
 Celebrate and strengthen Rotary by showcasing what we do and assisting the clubs in showcasing Rotary in their communities.  
 Maintain strong communication with and between the clubs. Encourage the use of social media with attractive up to date and vibrant website and media tools.  
 Establish a District committee to work with the web master to update the district website and Facebook Page (i.e. Social Media) - to keep them current, vibrant and relevant.  
 Conduct Friendship Exchange to New Zealand.

| <b>Committee</b>                    | <b>Chair</b>              | <b>Goal</b>   | <b>Action</b>     | <b>Timeline</b> | <b>Status</b> |
|-------------------------------------|---------------------------|---|-------------------|-----------------|---------------|
| Lead                                | Elizabeth DeGroot         | Lead and inspire the team PR team. Report to DAC  |                   |                 |               |
| Web Master                          | Dave Porter               | Manage access to web site platform. Make changes as requested. Work on French translation of new platform |                   |                 |               |
| Promotion<br>\$5000                 | Brenda Booth              | Create and implement a district wide Public Image campaign  |                   |                 |               |
| District Website<br>Budget \$500    | Bill Hagborg              | Update the district site  |                   |                 |               |
| Friendship Exchange<br>Budget \$250 | Brian Menton<br>(2017-18) | Lead one friendship exchange  | Organize exchange |                 |               |



## 6. Foundation: To enhance Rotarians' understanding of and commitment to the Rotary Foundation and optimize its use to meet Rotary's 6 areas of focus

**Director:** Sue Cook 2016 - 18      **\$8900** separate budget for SHARE/District Designated Fund

- DG's Goals**
- Sustain and build contributions to the Foundation
  - Celebrate the Foundation's Centennial
  - Support club based international projects involving partnerships and travel
  - Encourage Clubs to contribute to and access Foundation funds
  - Implement VTT

**Tasks**

Promote Foundation giving by demonstrating its benefits – set targets for clubs.  
 Manage Foundation resources to maximize the benefit to clubs.  
 Hold District events to come together to celebrate and educate about the Foundation  
 Provide support to clubs in understanding and accessing the Foundation.  
 Hold one District-wide Foundation event per annum.  
 Identify and implement a VTT in 2016 - 17

| Committee                                     | Chair                 | Goal   | Action  | Timeline                                     | Status |
|---|-----------------------|--|---|--|--------|
| Lead Budget \$5000                            | Sue Cook 2016 -19     | To educate, motivate, and inspire Rotarians to participate in Foundation activities. | Plan, organize, and promote district seminars (grant management seminar, district Rotary Foundation seminar, district team training, and presidents-elect training seminar; provide support to club Foundation committees.  | ongoing                                      |        |
| Scholarships & Peace Fellowships Budget \$100 | Colin Vickers 2015-18 | To find and support one Global Grant Scholar and one World Peace Fellow.             | Global Grant Scholarship: Coordinate orientation for scholarship recipients. Confirm participation by the host district and determine whether training or guidance is necessary for the host counsellor. Ensure that Rotarians in the host district are informed that a scholarship recipient will be studying there. Maintain contact with scholarship recipients during the study | Jan: distribute materials<br>April: apps due |        |



|                                     |                          |   |  |                 |  |
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|                                     |                          |   | <p>year.</p> <p>World Peace Fellowship: Distribute application materials to clubs. Establish a selection committee. Select qualified candidates. Conduct orientation for fellowship recipients. Provide training and guidance to sponsor and host counsellors.</p>   | May: interviews |  |
| Annual Program Fund<br>Budget \$200 | Joyce Campbell           | Help clubs set Annual Fund goals.   | <p>Publicize club and district monthly goal achievements.</p> <p>Encourage contributions in support of club goals.</p> <p>Encourage participation in fundraising events.</p> <p>Promote special giving opportunities such as the Paul Harris Society, Rotary Foundation Sustaining Member gifts, challenge/leverage gifts, corporate matching gifts, and corporate and community Foundation support.</p>   |                 |  |
| District Grants<br>Budget \$200     | Kim Giffen<br>2016 -19   | <p>To manage, promote and encourage implementation of Rotary Foundation District grants.</p> <p>To ensure all Clubs are well informed about District Grant opportunities and that more than ½ of Clubs apply for and receive a DG.</p> <p>To ensure Club members feel supported through the DG process from application to final report</p> | <p>Serve as a district expert and resource on all Rotary Foundation District grants.</p> <p>Follow and enforce the terms and conditions of grant awards for district and global grants; disseminate and conduct club education on the terms and conditions.</p> <p>Work with the district Rotary Foundation committee chair to disburse grant funds and to ensure that proper records of grant activity are maintained for reporting purposes.</p> <p>Establish and maintain appropriate grant management recordkeeping systems.</p> <p>Provide training sessions throughout the District. Be resourceful to Clubs as required. Ensure Clubs are regularly informed about the status of DGs.</p> |                 |  |
| Global Grants<br>Budget \$200       | Colin Thacker<br>2015-18 | To manage, promote and encourage implementation of Rotary Foundation Global grants.   | <p>To help clubs participate in educational, vocational, and humanitarian activities.</p> <p>Serve as a district expert and resource on all Rotary Foundation Global grants.</p> <p>Follow and enforce the terms and conditions of grant</p>   |                 |  |

|                                   |                         |   |   |  |  |
|-----------------------------------|-------------------------|---|---|--|--|
|                                   |                         |   | <p>awards for district and global grants; disseminate and conduct club education on the terms and conditions.</p> <p>Work with the district Rotary Foundation committee chair to disburse grant funds and to ensure that proper records of grant activity are maintained for reporting purposes.</p> <p>Ensure implementation of proper stewardship and grant management practices for all club- and district-sponsored grants, including reporting to The Rotary Foundation on all grants.</p> <p>Establish and maintain appropriate grant management recordkeeping systems.</p> |  |  |
| Vocational Teams<br>Budget \$1000 | Brian Menton            | To send at least one team internationally   | <p>To continue to investigate potential Vocational Teams and provide leadership and expertise to clubs.</p> <p>Establish criteria and solicit club submissions.</p> <p>Interview candidates and choose a leader, members, and alternates.</p> <p>Identify partner districts.</p> <p>Ensure fulfillment of all program requirements.</p> <p>Coordinate local itineraries.</p> <p>Coordinate team orientation and language training needs.</p>  |  |  |
| Endowment Fund<br>Budget \$500    | Bill Hagborg            | To inform Rotarians of planned giving opportunities.  | <p>Coordinate the identification, cultivation, and solicitation of potential donors in support of the Permanent Fund; involve district leadership, regional Rotary Foundation coordinators, Trustees and Directors, alumni, and Major Donors in planning and soliciting major gift prospects, as appropriate.</p>   |  |  |
| Polio<br>Budget \$100             | Liz Mossburg<br>McInnis | To support Rotary's commitment and to encourage all Rotarians to participate in PolioPlus activities. | <p>Work with the local media to promote fundraisers, activities, and stories about polio survivors.</p> <p>Send updates to clubs about the number of polio cases.</p> <p>Promote National Immunization Days and encourage club</p>  |  |  |



|  |                 |   |   |  |  |
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|  |                 |   | members to participate.<br>Use End Polio Now pins and other PolioPlus items to raise awareness of Rotary's work to eradicate polio. |  |  |
| Paul Harris Society<br>Budget \$200      | Joyce Campbell  |   |   |  |  |
| Foundation Dinner<br>Budget \$1400 (+/-) | North Bay Clubs | To hold a District Foundation Dinner to celebrate the 100 <sup>th</sup> anniversary of the foundation | Host a Rotary Foundation Dinner in 2011-17.   |  |  |

**7. District Administration:** To be the “go to” resource to support clubs in implementing their goals and programs through enhanced communication.

|                                       |  |
|---------------------------------------|--|
| <b>District Governor: Mike Kinsey</b> | <b>\$260,150.00</b> (includes District Conference) |
|---------------------------------------|--|

- DG’s Goals**
- Lead by example
  - Showcase success
  - Focus on Fellowship
  - Maximize RI Convention attendance
  - Host an engaging, inclusive conference
  - Link budget to achievements

**Tasks**

Ensure each Director and AG has set goals which are reflected in their Committee chairs goals for the year.  
 Link goals to budget for each Committee.  
 Encourage and provide support for clubs to develop and implement strategic plans to give clubs a focus and direction.  
 Link effective planning with club achievement award.  
 Based on input from Committee Chairs and Directors and in accordance with RI goals work with District team at DTTS to confirm goals and develop an implementation plan for the year.  
 Present the plan at Rotary Weekend and get the presidents input and support.  
 Charge the AGs with the responsibility to promote and implement goals  
 Link the District plan for the year to the budget.  
 Report on progress to clubs on an ongoing basis and show results  
 Present a conference which engages and inspires in unexpected ways.  
 Ensure every club president and at least one other member attend the District conference.  
 Pull together strategic plan, District job descriptions, policies and procedures and post in prominent (and organized way) on District web site.  
 Work to ensure all 7010 Rotarians are familiar with the Plan.  
 Post minutes of District meetings so they are available to all Rotarians  
 Promote Atlanta and build to Toronto

| <b>Committee</b> | <b>Chair</b> | <b>Goal</b> | <b>Action</b> | <b>Timeline</b> | <b>Status</b> |
|------------------|--------------|-------------|---------------|-----------------|---------------|
| Lead             | Mike Kinsey  |             |               |                 |               |

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| Assistant Governors<br>Area 1<br>Area 2<br>Area 3<br>Area 4<br>Area 5<br>Area 6<br>Area 7<br>Area 8<br>Budget \$4500 (+/-) | Bruce McMullen<br>Luc Chalifoux<br>Brett Tucker<br>Janet Stead<br>Michael Christie<br>Doug Moody<br>Lyn Vuorimaki<br>Rick Storey | Support clubs<br>Meet with presidents to prepare for the year ahead<br>Prepare clubs for District Governor visit<br>Report to District advisory council on club progress   |  |  |  |
| Secretary<br>Budget \$1200   | Helen Robinson   | Assist clubs with attendance reporting<br>Have all DAC members submit reports in a timely manner – 3 times per year AGM – president elect attendance<br>Deliver Secretary training at Rotary weekend<br>Organize November DAC<br>Take minutes at DAC and AGM     |  |  |  |
| Finance Committee<br>Budget \$11.500   | Lise Dutrusec<br>2016/17<br>Margaret Walton<br>2017-18   | 1) Ensure the development of each year's District budget reflects the input from the members of the District Advisory Committee.<br>2) Oversee the actions of the Treasurer's office and receive quarterly reports of profit and loss against budget and balance | Meet with committee chairs to set budget linked to goals.<br>Review fees |  |  |

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|                             |                             | sheet<br>3) Recommend a per capita levy on the membership.<br>4) Present a balanced budget to the membership on an annual basis.  |   |  |  |
| Treasurer<br>\$1400         | Scott Brumwell              | Educate Members regarding the importance of accurate & detailed reporting.<br><br>Advise members on new expense claim.<br><br>.   | Present to DAC  |  |  |
| Strategic Planning<br>\$500 | Mike Kinsey<br>Sue Davidson | To continue to update the strategic plan  | Work with District leaders to promote and implement plan  |  |  |
| Resolutions & Protocol      | Don Watkins                 |   |   |  |  |
| Insurance<br>\$35000 (+/-)  | Marlene Musclow             | To assist District Clubs with insurance related questions.<br>To act as intermediary between the Brokerage (Norwich Insurance Brokers) handling the Canadian Rotary Insurance Program and District 7010 | Provide any details to DG in regards to program changes.<br><br>Forward Premium calculations to the District Treasurer for individual club billings. Assist and Advise District Clubs who require assistance. |  |  |
| Nominations<br>Budget \$850 | Brian Menton                |   |   |  |  |

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| District Conference<br>\$1 (+/-) | Ashley Arnold<br>And Host organizing committee | Assist HOC Chair and Conference Committee with planning and hosting District Conference(s)  | Participate in monthly planning e and give input as required. | Complete now working on 2015 and 2016 conferences |  |
| Protection Officer               | Angela Knightvanschaayk                        | Foster awareness of policy  | Educate district committees most affected (e.g. YE, RYLA)     |   |  |
| Administration                   | Joyce Campbell                                 | Keep district organization chart up to date on ClubRunner and Excel spreadsheet.<br>Advise annually Rotary Fellowships with a link<br>Rotary Alumni with a link |   |   |  |

## Implementation Plan – in progress, link to District budget

### Measures for success

|   |  |
|---|--|
| Support and Strengthen Clubs            | <ul style="list-style-type: none"> <li>• Increase use of Rotary club central</li> <li>• Encourage more members to attend the R.I. Convention in Toronto</li> <li>• Engage members increase retention</li> <li>• Host a fun District conference</li> <li>• Assist clubs in starting electronic archives to preserve club history</li> </ul> |
| Focus and increase Humanitarian Service | <ul style="list-style-type: none"> <li>• Sustain and build contributions to the Foundation</li> <li>• Have clubs participate with hands on international projects</li> <li>• Continue with district based project</li> <li>• Increase the amount of global grants</li> </ul>   |
| Enhance Public Image and Awareness      | <ul style="list-style-type: none"> <li>• Optimize use of social media</li> <li>• Promote club based PI programs</li> <li>• Have clubs update their websites</li> <li>• Celebrate and identify those that have been the one to start a project or fund raiser that has inspired others</li> </ul>   |
| Youth                                   | <ul style="list-style-type: none"> <li>• Connect with youth</li> <li>• Have clubs and district invest in Rotaract</li> <li>• Partner with the YMCA to expand Interact</li> <li>• Increase the number of Youth Exchange students</li> </ul>   |
| Polio                                   | <ul style="list-style-type: none"> <li>• Increase fun raising contributions to the End Polio now campaign</li> <li>• Host a district wide walk on Oct 24<sup>th</sup> to create awareness across the district</li> </ul>   |

## District 7010 Tasks to Implement the Goals

|                 | 2015-16 DG Lise   | 2016-17 DGE Margaret<br>Tasks to Achieve Goals  | 2017-18  |
|-----------------|---|---|--|
| New Generations | <p>Showcase and include Rotaractors at all district events e.g. DTTS in February, Rotary weekend, in April, District Conference in the Fall.</p> <p>Find a champion interested and willing to start up a new Rotaract club.</p> <p>Complete a Friendship exchange to Taiwan.</p>  | <p>Develop a coordinated strategy to ensure active participation in all areas of New Generations.</p> <p>Involve Interact, Roteract, Youth Exchange, children (or grandchildren ) of Rotarians in District conference to build the family of Rotary</p> <p>Provide support to promote the youth exchange programs.</p> <p>Support existing Interact and Roteract Clubs and provide support to establish new ones.</p> | <p>Evaluate the current programs that are offered and how we deliver on them. Strengthen the existing ones before starting new invitees.</p> <p>Have all Rotaract clubs on a mentoring program with sponsoring clubs. Match club positions.</p>  |
| Membership      | <p>Encourage clubs and members to identify communities/regions that would benefit from a Rotary club.</p> <p>Discuss and explore the idea of satellite clubs with clubs in the District and promote the guidelines developed by District.</p> <p>Encourage clubs to work with District Membership Chair to help increase membership and retention rate.</p> <p>Encourage clubs to develop and implement a “better retention” plan that fits with their club.</p> <p>Encourage clubs to increase the fellowship and fun within their club.</p> | <p>Strengthen the District membership recruitment, engagement and retention plan based on attracting all demographics and providing alternative meeting options that respond to a variety of needs.</p> <p>Help clubs do a community scan to identify and recruit potential members</p> <p>Encourage establishment of clubs with different profiles to accommodate more members.</p>                                  | <p>Make retention and engagement top goals for clubs. Find and share valuable training tools for fostering retention. Have clubs follow up with exit interviews or feedback so that we can use the information to formulate club strategies on retention.</p> <p>Manage the information so it can be used</p> <p>Reach out to other service clubs for potential recruitment.</p> |
| Service         |   | Have each Committee identify a  | Have a central site for sharing all  |

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| Projects                                |   | <p>project in their area of focus that could be implemented by the District (with club participation) or which could be a prototype for clubs to use in their communities.</p> <p>Provide an opportunity for sharing project ideas between clubs and members.</p> <p>Assist clubs in developing and implementing local projects</p> <p>Implement District projects to draw Rotarians together</p>  | <p>clubs projects so that successes can be used and failures can be learned from.</p> <p>Encourage projects that can be shared by clubs so that workload and success can be shared</p>  |
| Training Building Leadership Continuity | <p>Develop and implement a process to identify future district leaders.</p> <p>Select one or 2 of the future leaders identified for further development i.e. attend Zone Institute.</p> <p>Review relevant job description with individual director and chair on an annual basis and modify as required.</p> <p>Seek volunteers with Rotary knowledge and facilitation skills to build training teams for events such as DTTS &amp; Weekend (President Elect Training).</p> | <p>Implement a program to identify and train future leaders for District positions based on a succession plan.</p> <p>Use DTTS to build a unified team with common goals for the year</p> <p>Focus on Rotary weekend to engage all Rotarians</p> <p>Use District conference as an inspiration to educate and engage all Rotarians</p> <p>Promote RLI</p> <p>Encourage participation in International convention as a way of educating and inspiring leaders.</p> | <p>Find a way to use or share the training that has been done.</p> <p>Step up investment of resources in future leader program. Have AG's assist in identifying potential leaders that we have in our existing membership.</p> <p>Share how FUN and informative the programs we offer are. Leadership training, district conference, R.I. conventions).</p> |
| Public Image                            | <p>Encourage all clubs to appoint Public Image chair and support them in their publicity efforts.</p> <p>Encourage all clubs to promote their activities in local media.</p> <p>Support clubs in their use of Rotary Club Central.</p>  | <p>Develop and implement a District Image Campaign to raise Rotary's profile amongst both members and the public.</p> <p>Provide support and draw on RI resources to help the clubs do local PR campaigns</p>  | <p>Have clubs share PR efforts.</p> <p>Educate membership on the use of PR tools that are available to them.</p>  |



|                    |   |  |  |
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|                    |   | <p>Celebrate and strengthen Rotary by showcasing what we do and assisting the clubs in showcasing Rotary in their communities.</p> <p>Maintain strong communication with and between the clubs. Encourage the use of social media with attractive up to date and vibrant website and media tools.</p> <p>Establish a District committee to work with the web master to update the district website and Facebook Page (i.e. Social Media) - to keep them current, vibrant and relevant.</p> |  |
| Foundation         | <p>Achieve donation of 100% of Every Rotarian Every Year with minimum per capita giving of \$195 US per club member.</p> <p>Achieve per capita giving of \$20 US per club member to Polio Plus.</p> <p>Encourage clubs to dedicate at least 2 meetings during the year to talk about Foundation and/or about the eradication of polio and its importance.</p> | <p>Promote Foundation giving by demonstrating its benefits – set targets for clubs.</p> <p>Manage Foundation resources to maximize the benefit to clubs.</p> <p>Hold District events to come together to celebrate and educate about the Foundation</p> <p>Provide support to clubs in understanding and accessing the Foundation.</p> <p>Hold one District wide Foundation event per annum.</p> <p>Identify and implement a VTT in 2016 - 17</p>  | <p>Make foundation dinners part of the goals for every club.</p> <p>Gather interesting informative media and encourage every club to dedicate one meeting per year in foundation month to sharing the information provided.</p> <p>Make sure each club has a foundation champion that is aware of all the programs offered</p> |
| Strategic Planning | Implement Strategic Plan.   | <p>Ensure each Director and AG has set goals which are reflected in their Committee chairs goals for the year.</p> <p>Link goals to budget for each Committee.</p>   | <p>Make strategic planning a team effort.</p> <p>Monitor that the plan is being followed by allowing time at DAC/DITTS for reviewing the plan</p>  |

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|                               |  | Encourage and provide support for clubs to develop and implement strategic plans to give clubs a focus and direction.<br>Link effective planning with club achievement award.   |  |
| Establish District Priorities | Seek input from the district leaders to establish the priorities for the district – this can be done during the District Team Training Seminar (DTTS) held in February.<br>Once priorities have been established, earmark a portion of the budget to be distributed to the District committees, based on their budget input and the funds available.<br>Seek ways to enhance communication and to keep lines of communication open between DG, AG's & Directors e.g. Go to meeting, free conference, face to face meetings, email etc.<br>During the Annual General Meeting (AGM) in April, present the draft budget to the Presidents-elect AND provide the rationale for spending. If in agreement, the budget is to be approved by Club Presidents-elect. | Based on input from Committee Chairs and Directors and in accordance with RI goals work with District team at DTTS to confirm goals and develop an implementation plan for the year.<br>Present the plan at Rotary Weekend and get the presidents input and support.<br>Charge the AGs with the responsibility to promote and implement goals | After everyone has input in the form of the reports at DAC set time in the agenda to set goals and budget for the goals.<br>Facilitate a way of making sure the priorities are getting the effort they require |
| Budget                        | Review budget requests and budget allocation with each of the District committee chairs.<br>Explore ways to meet shortfalls, if any.<br>In collaboration with the Finance  | Link the District plan for the year to the budget.<br>Report on progress to clubs on an ongoing basis and show results  | Make clubs more aware of the district budget.  |

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|                          | committee, establish amount to be kept in reserve for future expenditures.   |  |  |
| Build District Community | <p>Rotary. It's in our nature. Rotary, naturellement.</p> <p>Promote and strongly encourage ALL Rotarians to attend the Rotary district conference. Ensure a strong program with a good balance of Rotary content, fellowship and fun to build momentum and enhance attendance at future conferences.</p> <p>Use the conference as an opportunity to bring awareness and garner interest by guests and spouses as potential Rotarians.</p> | <p>Present a conference which engages and inspires in unexpected ways.</p> <p>Ensure every club president and at least one other member attend the District conference.</p> <p>Pull together strategic plan, all District job descriptions, policies and procedures and post in prominent (and organized way on District web site and work to ensure all 7010 Rotarians know what is is and where it is .</p> <p>Post minutes of District meetings so they are available to all Rotarians.</p> | <p>Build more excitement into events. Offer quality programs that suit the present needs and conditions.</p> <p>Engage AG's to promote district events at the club level.</p> <p>Make communicate more direct to club members.</p> |
| RI                       | <p>Target 30 participants to attend the 2016 RI Convention in SEOUL from May 28<sup>th</sup> to June 1<sup>st</sup>, 2016 by promoting it at each of: District Conference, District Team Training Seminar (DTTS), Rotary Weekend and by asking ALL clubs to show the promotional video of the convention between September and December.</p>   | <p>Promote Atlanta and build to Toronto</p> <p>Conduct Friendship exchange to New Zealand</p>  | <p>Make all club members aware of friendship exchanges and international opportunities.</p> <p>Promote the quality of speakers at RI events.</p>   |
|                          |  |  |  |

