



Table of Contents

1. **Executive Summary** – p. 3
2. **District 5340's Path Forward: Meeting the Needs of San Diego & Imperial Counties**
 - Demographic Realities
 - Community Needs Rotary Can Address
 - Opportunities for Strategic Impact
 - Suggested Local & Regional Partners
 - Measuring Our Impact
 - Conclusion
3. **District 5340 Membership Growth Action Plan** – p. 7
 - Recruitment Tactics
 - Marketing and Visibility
 - Member Engagement & Retention
 - Community Integration
 - Leadership & Structure
4. **TRF Annual Fund Action Plan** – p. 10
 - Education & Awareness
 - Encouragement & Recognition
 - Engagement through Fundraising
 - Administrative Support & Accountability
5. **PolioPlus Action Plan** – p. 13
 - Education & Awareness
 - Fundraising & Contribution Strategies
 - Engagement & Community Connection
 - Accountability & Recognition

6. **Increase New TRF Benefactors Action Plan** – p. 16
 - Education & Understanding
 - Conversations & Connection
 - Events & Engagement
 - District-Level Support
7. **Enhance Participant Engagement Action Plan** – p. 19
 - Planning & Structure
 - Promotion & Awareness
 - Member Engagement & Accountability
 - Innovation & Flexibility
 - District-Level Support
8. **Increase Our Ability to Adapt Action Plan** – p. 22
 - Strategic Planning Culture & Commitment
 - Leadership Pipeline & Succession
 - Monitoring, Tracking & Accountability
 - District Support & Tools
9. **Other Club Goals: Honoring the Work of Our 62 Clubs** – p. 25
 - Club Engagement, Belonging & Visibility
 - Youth & Education Programs
 - Service Projects & Community Support
 - Club Growth, Succession & Innovation
 - Special Projects & Bold Goals
 - Final Words of Appreciation
10. **Appendix: Rolling Goal Summary Charts by Year** – p. 28

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San Diego Rotary Club #33 | Immediate Past President 2024-2025



Rotary District 5340's Path Forward

Meeting the Demographic and Community Needs of San Diego and Imperial Counties

Executive Summary

Rotary International District 5340, comprising 62 clubs across San Diego and Imperial counties, is poised to lead transformative change in one of the most dynamic regions in the United States. With a combined population of over **3.6 million residents**, these counties reflect a tapestry of age, culture, economic disparity, and urgent needs—from youth support and cross-border collaboration to homelessness, food insecurity, and environmental stewardship.

By aligning its well-structured action plans with regional data and local partnerships, District 5340 can ensure Rotary's impact is **visible, relevant, and inclusive**.

The Demographic Reality: Who We Serve

San Diego County:

- **Population:** 3.3 million+
- **Latino/Hispanic residents:** 34.1%
- **Veterans:** 240,000+ (2nd largest veteran population in the U.S.)
- **Homeless population:** ~10,264 individuals as of 2023 (an 18% increase from 2022)
- **Youth under 18:** 22.4%
- **Refugee resettlement hub:** Over 100,000 refugees have resettled since 1975

Imperial County:

- **Population:** 180,000+
 - **Latino/Hispanic residents:** 85%
 - **Poverty rate:** 21% (vs. 11.7% national average)
 - **Unemployment:** 15%+ (among the highest in the state)
 - **Limited health access:** Only 1 primary care physician per 3,000 residents
-

Community Needs Rotary Can Address

1. Homelessness and Housing Insecurity

“Rotary’s visibility must match the severity of local need.”

- **Opportunities for Impact:**
 - Support hygiene kit drives, mobile showers, and hot meal service through partners like **Father Joe’s Villages** and **Alpha Project**
 - Collaborate with **San Diego Housing Commission** and **Regional Task Force on Homelessness** for advocacy and direct support
 - Expand club participation in **Tiny Home or Sleeping Cottage builds**
 - Launch Interact-led winter clothing drives in Imperial Valley

2. Youth Empowerment and Education Equity

“More than 30% of children in Imperial County live below the poverty line.”

- **Opportunities for Impact:**
 - Expand Interact and Rotaract clubs in underrepresented districts (e.g., Brawley, Calexico)
 - Partner with **AVID**, **San Diego County Office of Education**, and **Imperial Valley College**
 - Sponsor more students for **RYLA**, 4-Way Test contests, and scholarships for first-generation college students

3. Veterans and Military Families

- **Opportunities for Impact:**
 - Collaborate with **Wounded Warrior Project**, **USO San Diego**, and **Veterans Village**
 - Offer mentorship, job-readiness training, or family support through Rotary’s vocational service framework

4. Health and Mental Wellness

- **Opportunities for Impact:**
 - Host community health fairs in partnership with **Vista Community Clinic, Imperial County Behavioral Health, and Sharp HealthCare**
 - Launch mental health literacy projects with **NAMI San Diego** or school-based wellness centers
-

Strategic Actions from District Plans

Expand Our Reach

“Support transitions to E-Clubs, target young professionals, retirees, and alumni of service programs.”

- Offer culturally relevant outreach in Spanish, Tagalog, and Arabic
- Embed **public service internships** through collaboration with community colleges

Enhance Participant Engagement

“Clubs are encouraged to run monthly service events and partner with local organizations to increase participation.”

- Create a district-wide **“Day of Dignity”** focused on homelessness and hunger
- Use social media to highlight impact and invite new hands-on volunteers

Strategic Planning & Adaptability

“Annual retreats and 3-year rolling plans guide progress.”

- Equip clubs with **real-time dashboards** to track service hours, member retention, and fundraising
- Provide cultural competency and bilingual leadership training

Annual Fund & PolioPlus Integration

“Link giving directly to service and public visibility.”

- Share how TRF funds supported **binational medical clinics**, polio awareness in migrant communities, and literacy in farmworker families
-

Suggested Local & Regional Partners

Area	Potential Partners
Homelessness & Housing	Father Joe’s Villages, Alpha Project, PATH, Interfaith Community Services, The Tuesday Group/Lucky Duck Foundation
Education & Youth	County Office of Education, AVID, YMCA, Boys & Girls Clubs, AAU
Health & Wellness	NAMI San Diego, Imperial County Public Health Dept., Sharp HealthCare
Veterans	Veterans Village, USO, Wounded Warrior Project
Cross-Border Work	Tijuana Rotary Clubs, Corazón, Border Angels
DEI & Language Access	MAAC Project, Alliance San Diego, Centro de Servicios Sociales, Chicano Federation, UPAC

Measuring Our Impact

District 5340 can track progress with the following key metrics:

- % of clubs with **local partnerships addressing priority issues**
 - **of service hours contributed to homelessness relief**
 - Growth in **youth program participation** (Interact, RYLA, scholarships)
 - Year-over-year **increase in bilingual or culturally inclusive programming**
 - % of clubs with a **3-year strategic plan and engagement goals**
-

Conclusion: The Path Ahead

The needs in San Diego and Imperial counties are great—but so is the opportunity. With a bold, localized, and inclusive approach, Rotary District 5340 can become an indispensable partner in building healthier, more resilient communities.

“Rotary is uniquely positioned not just to serve—but to **connect**. By adapting to our communities’ needs, we don’t just expand our reach—we deepen our purpose.”

Together, we serve with relevance. Together, we lead with heart. Together, we are Rotary.



Rotary International District 5340 Membership Growth Action Plan

Goal: Expand Our Reach – Support all 62 Clubs in achieving sustainable membership growth by the end of the Rotary Year, while accounting for historical attrition and maintaining vibrant, engaged membership.

I. Recruitment Tactics

1. Personal Invitations

- Encourage all members to invite friends, family, and professional contacts.
- Launch a quarterly "Bring a Friend" campaign across all clubs.
- Host open house events to showcase club culture and values.

2. Targeted Outreach

- Identify and invite graduating Rotaract members.
- Recruit young professionals and retirees through professional and community networks.
- Engage community leaders and alumni of service programs.

3. Flexible Club Models

- Encourage the formation of Satellite Clubs.
 - Support transitions to E-Clubs for digital engagement.
-

II. Marketing and Visibility

1. Social Media Strategy

- Develop branded content for Instagram, Facebook, and LinkedIn.
- Highlight service projects and community impact stories.

2. Traditional Media & Partnerships

- Submit press releases and photo stories to local newspapers.
- Partner with local chambers, schools, and civic groups for co-branded outreach.

3. Website & Digital Presence

- Maintain up-to-date club websites with membership calls to action.
 - Leverage Rotary Central tools to track engagement and performance.
-

III. Member Engagement & Retention

1. Onboarding & Mentorship

- Implement a New Member Passport Program.
- Pair new members with mentors for first 90 days.

2. Inclusive Programming

- Offer varied meeting formats (lunch, virtual, evening socials).
- Create roles for new members to contribute immediately.

3. Recognition & Belonging

- Celebrate active recruiters and service contributors.
 - Ensure members feel their voices and ideas matter.
-

IV. Community Integration

1. High-Visibility Events

- Organize 2 community networking events per year per club.
- Promote Rotary booths at local festivals, schools, and sports events.

2. Service as a Recruitment Tool

- Invite non-members to participate in service projects.
- Share impact data publicly to inspire involvement.

3. Strategic Alliances

- Partner with nonprofits, cultural groups, and youth programs.
 - Develop joint programming to attract mission-aligned individuals.
-

V. Leadership & Structure

1. Clear Goals and Accountability

- Set individualized net membership goals by club.
- Assign roles and responsibilities within each Membership Committee.

2. Regular Review and Feedback

- Hold quarterly check-ins on recruitment progress.
- Use feedback loops to adjust outreach tactics as needed.

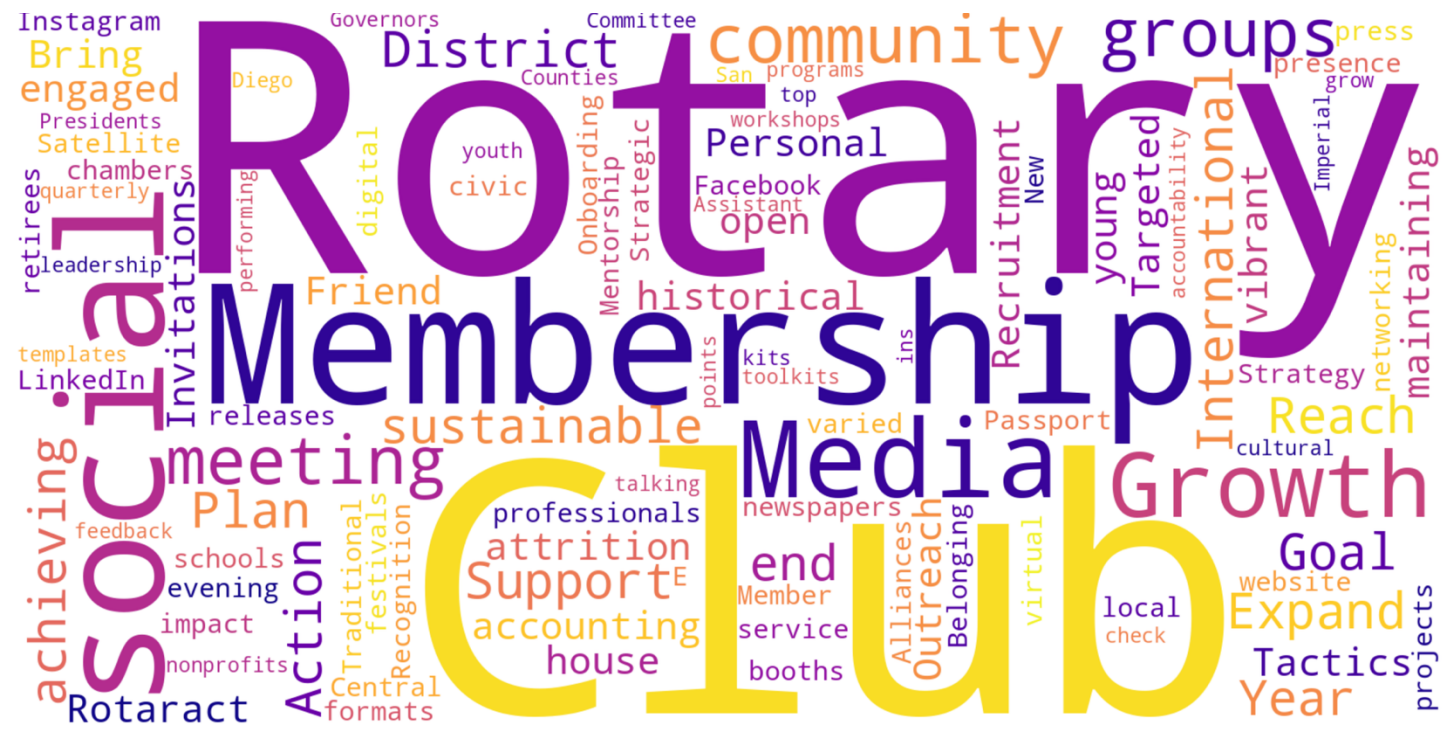
3. Resources and Training

- Offer District-led workshops and toolkits for Membership Chairs.
 - Provide templates, social media kits, and talking points to all clubs.
-

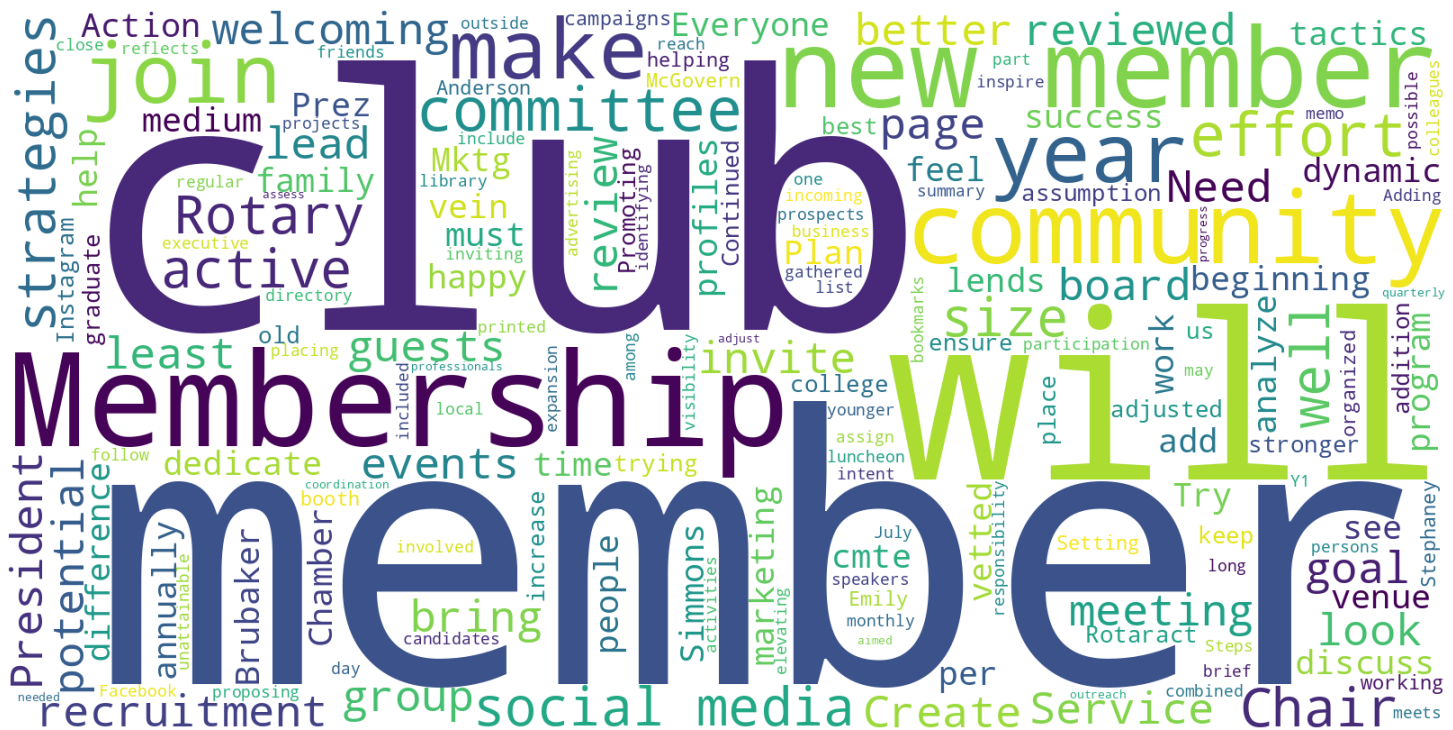
Call to Action:

- Distribute this plan to all Assistant Governors and Club Presidents.
- Set monthly progress reporting expectations.
- Recognize top-performing clubs at mid-year and year-end.

Together, let's Expand Our Reach and grow Rotary in San Diego and Imperial Counties!



The most frequent and emphasized terms include **“club,” “member,” “membership,” “community,” “committee,”** and **“will”**—highlighting a strong collective focus on recruitment, engagement, and collaborative action.





Rotary International District 5340 TRF Annual Fund Action Plan

Goal: To strengthen giving to The Rotary Foundation's Annual Fund through consistent education, engagement, and encouragement—ensuring every Rotarian, every year (EREY) contributes meaningfully.

I. Education & Awareness

1. Quarterly TRF Learning Sessions

- Clubs will host at least one TRF-focused session per quarter.
- TRF Chairs and Presidents will co-lead presentations on fund impact, grant opportunities, and success stories.

2. New Member Orientation & Fireside Chats

- Introduce TRF and EREY principles in new member onboarding.
- Share videos, impact stories, and explain how TRF supports local/global service.

3. Foundation Features in Club Meetings

- Highlight TRF giving status at meetings.
- Include stories from Rotary Magazine and examples of Rotary-funded projects.

4. Visible Progress Tracking

- Display per capita giving and progress to goal visibly at meetings or online.
 - Celebrate member donations monthly.
-

II. Encouragement & Recognition

1. Promote EREY and Rotary Direct

- Encourage members to set up automatic monthly contributions via Rotary Direct.
- Reinforce how even \$10/month can have global impact.

2. Celebrate Donors and Clubs

- Monthly shout-outs for individual and collective giving.
- Recognize clubs meeting and exceeding goals at mid-year and year-end.

3. Comparative Giving Tools

- Use relatable comparisons (e.g., cost of lunch = monthly gift).
 - Display time remaining and average gift needed per member to reach club goals.
-

III. Engagement through Fundraising

1. Club-Level Fundraising Events

- Encourage annual fundraising event per club with proceeds to TRF.
- Empower members to propose creative fundraising ideas each year.

2. Joint Club Projects

- Promote inter-club fundraising collaborations and impact stories.
- Host foundation nights and mixers with giving focus.

3. Link Giving to Service Projects

- Emphasize how TRF enables matching grants for local and international projects.
 - Show the direct line between giving and impact.
-

IV. Administrative Support & Accountability

1. TRF Chair Responsibilities

- Track giving monthly; share updates with club board and members.
- Work with Treasurer to include EREY options in dues or as quarterly add-ons.

2. Club Progress Reporting

- District to send quarterly snapshots to clubs: total given, % EREY, and Rotary Direct use.
- Encourage reflection and adjustments to strategy mid-year.

3. District-Level Support

- Provide marketing toolkits and training to TRF Chairs.
 - Share grant success stories and how giving made them possible.
 - Offer matching incentives or recognitions for high-performing clubs.
-

Key Metrics for Success:

- % of members contributing annually (EREY)
 - % of members on Rotary Direct
 - Per capita giving by club
 - Total District 5340 Annual Fund giving
 - Number of TRF education engagements per club
-

Call to Action:

Rotary asks that every Rotarian give something every year. Let's empower our clubs with the tools, support, and inspiration needed to make this goal a reality—and increase our impact for generations to come.

Together, we can turn generosity into action.



Rotary International District 5340 PolioPlus Action Plan

Goal: To ensure every club contributes meaningfully to Rotary's global PolioPlus initiative, advancing eradication efforts through fundraising, education, and engagement.

I. Education & Awareness

1. PolioPlus Chair Appointment

- Every club will appoint a dedicated PolioPlus Chair to lead initiatives, track progress, and report monthly.

2. Quarterly Awareness Campaigns

- Present RI polio updates during club meetings.
- Include PolioPlus stories in newsletters and social posts.

3. New Member Orientation & Fireside Chats

- Introduce the history and impact of PolioPlus to all new members.
- Encourage involvement through stories, videos, and hands-on opportunities.

4. World Polio Day (Oct 24)

- Clubs will host a Polio-focused meeting, fundraiser, or awareness event each October.
-

II. Fundraising & Contribution Strategies

1. Annual Fundraising Events

- Each club will host at least one dedicated PolioPlus fundraiser (wine tastings, pub crawls, produce drives, etc.).
- Promote creative efforts like "Raise the Paddle," silent auctions, or virtual events.

2. Recurring Giving Campaigns

- Encourage small recurring member donations via MyRotary.
- Promote monthly giving via Rotary Direct.

3. Matching & Incentives

- Clubs to match member donations up to 50% of annual PolioPlus goals.
- Contests, raffles, and recognitions to boost engagement.

4. Budget Inclusion & Visibility

- Include PolioPlus giving as a line item in the club's annual budget.
 - Display donation progress at meetings or on club websites.
-

III. Engagement & Community Connection

1. Public Events for Awareness & Giving

- Promote public-facing events to raise awareness and attract community donations.
- Tie community projects to polio messaging.

2. Partner with Businesses & Local Leaders

- Involve local sponsors or host events at member businesses.
- Use events to educate non-members and recruit future Rotarians.

3. Unique Club Traditions

- Maintain traditions like Polio Pigs, Jamoncito collections, or recycling donation drives.
 - Share best practices among clubs through District channels.
-

IV. Accountability & Recognition

1. Monthly Club Reporting

- Track contributions monthly and share updates with boards and members.
- Celebrate milestones and individual contributions regularly.

2. District-Wide Recognition

- Recognize high-achieving clubs and individuals at mid-year and year-end.
- Share impact stories from clubs that exceeded giving goals.

3. Resource Sharing & District Support

- Provide clubs with PolioPlus toolkits, marketing materials, and story templates.
 - Host educational webinars and guest speaker opportunities.
-

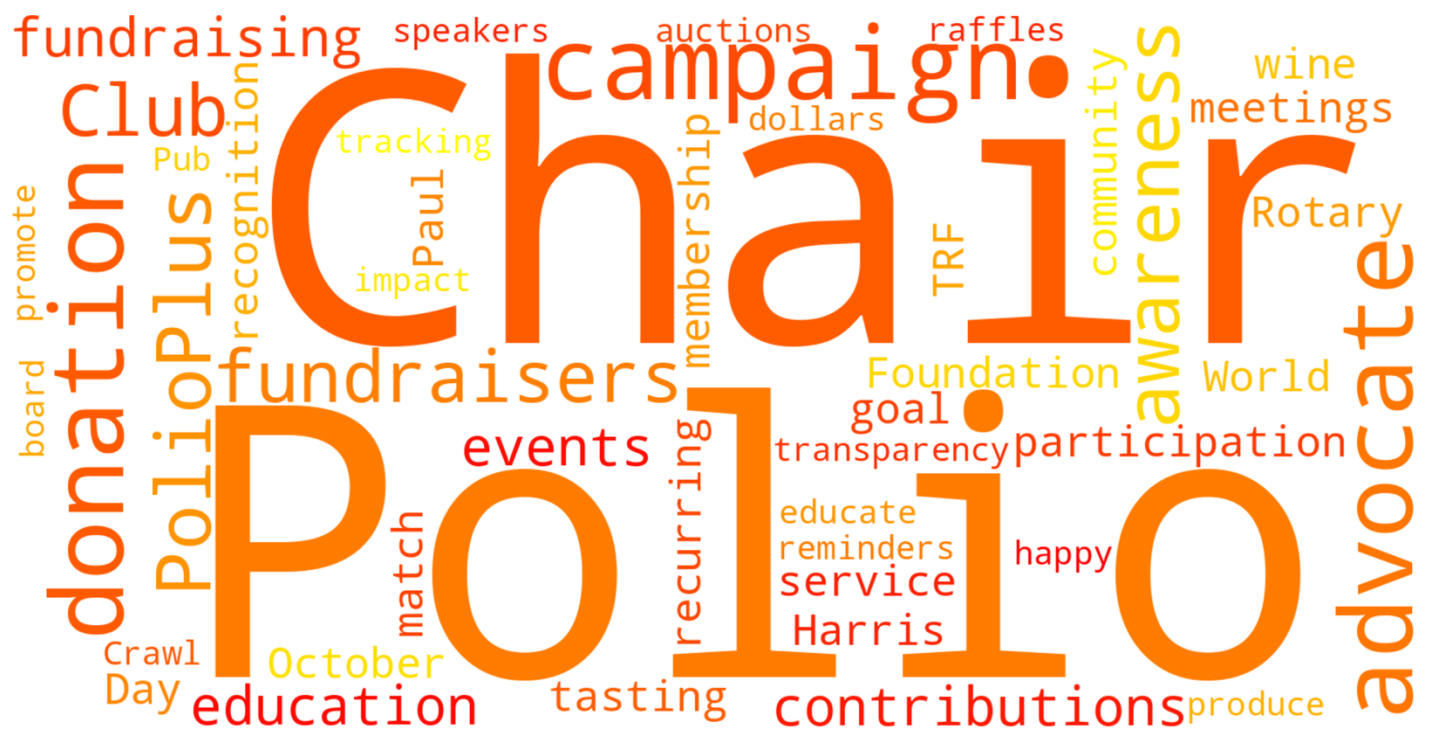
Key Metrics for Success:

- % of clubs contributing \$1,500 or more
 - Total District 5340 PolioPlus giving
 - Number of PolioPlus fundraising events held
 - Number of clubs with recurring monthly givers
 - Engagement levels during World Polio Day
-

Call to Action:

The fight to end polio is not over. Together, we can increase our impact—one club, one fundraiser, one dollar at a time. Let's make sure Rotary District 5340 is leading the way in the final push toward global eradication.

Together, we will end polio.



Most Frequent Themes:

1. **Leadership Roles:** A PolioPlus Chair and active club leadership ensure consistent focus, tracking, and motivation.
2. **Giving & Fundraising:** Clubs use techniques like raffles, auctions, and recurring donations to sustain momentum.
3. **Awareness & Education:** Efforts include club education, guest speakers, and campaigns tied to World Polio Day.
4. **Recognition & Participation:** Tracking progress and celebrating contributions keep members engaged.

The most common words reflect a strategic and committed approach to PolioPlus success. **Leadership roles** are foundational, with clubs emphasizing the importance of a dedicated PolioPlus Chair and active board support to maintain focus, track progress, and inspire action. A strong **giving and fundraising culture** is also evident, with clubs using creative methods like raffles, auctions, and recurring donations to build energy and consistency. **Awareness and education** efforts, including club presentations, guest speakers, and World Polio Day events, help inform and inspire members. Finally, **recognition and participation** are key—by setting clear goals, sending reminders, and celebrating contributions, clubs are keeping members engaged and motivated throughout the year.



Rotary International District 5340 Increase New TRF Benefactors Action Plan

Goal: To support clubs in inspiring members to become Rotary Foundation Benefactors by making outright gifts or estate plans to the Endowment Fund—leaving a legacy that sustains Rotary's mission for generations to come.

I. Education & Understanding

1. TRF Benefactor Education Campaign

- Launch district-wide awareness initiative with clear explanation of what it means to be a TRF Benefactor.
- Include benefactor education in new member orientation and annual TRF presentations.

2. Foundation-Focused Club Programs

- Host at least one annual presentation featuring a current Benefactor or Major Gifts Officer.
- Include short monthly "Foundation Minute" highlighting legacy giving.

3. Printed & Digital Materials

- Provide clubs with estate giving brochures and Rotary endowment resources.
- Share monthly content from The Rotary Foundation for newsletters and social media.

4. Board & Member Training

- Educate board members on how to initiate confidential planned giving conversations.
 - Train Foundation Chairs to lead these discussions and answer common questions.
-

II. Conversations & Connection

1. Fireside Chats & One-on-Ones

- Encourage Club Presidents/Foundation Chairs to personally invite members to consider becoming benefactors.
- Offer optional legacy planning sessions with District Foundation experts.

2. Highlight Member Stories

- Spotlight existing benefactors in club meetings and newsletters.
- Share personal stories about why members chose to leave a Rotary legacy.

3. Leverage Trusted Relationships

- Identify senior or retired members who may already be active givers and could be open to planned giving.
- Engage spouses/partners in the giving conversation.

III. Events & Engagement

1. **Annual Endowment Focus Month (January)**
 - District-wide push to host club presentations and TRF sessions focused on legacy giving.
 - Invite District Foundation Chair or Major Gifts Officer to present.
2. **Estate Planning Workshops**
 - Partner with local financial experts to offer optional sessions.
 - Educate members on how to include Rotary in wills, retirement accounts, and insurance policies.
3. **Recognition Opportunities**
 - Publicly thank new benefactors during meetings.
 - Provide optional pins or certificates for those who wish to be acknowledged.

IV. District-Level Support

1. **District Foundation Chair Guidance**
 - Supply clubs with materials, speakers, and planning tools.
 - Track and report progress toward annual new benefactor goals.
2. **Major Gifts Officer Involvement**
 - Schedule club visits and webinars to inspire and educate.
 - Offer personalized guidance for members considering larger gifts or estate plans.
3. **Goal Setting and Reporting**
 - Clubs encouraged to set minimum 1 new benefactor goal annually.
 - Include progress updates in Foundation reports and meetings.

Key Metrics for Success:

- Number of clubs hosting benefactor-related presentations or sessions
- Number of new TRF Benefactors added each Rotary year
- % of clubs with at least one active benefactor conversation underway
- Visibility and engagement with legacy giving materials

Call to Action:

Legacy giving is a deeply personal act of service. By encouraging thoughtful conversations and equipping our clubs with resources, we can ensure The Rotary Foundation remains strong and impactful for generations to come.

Together, we leave a legacy that never ends.



Most Frequent Themes:

- **Education & Awareness:** Many clubs emphasized the need to inform members about what it means to be a TRF Benefactor.
- **Estate Planning & Endowment:** The \$1,000 minimum contribution, often through estate plans, was frequently cited.
- **Encouragement & Support:** Clubs want to foster a culture of giving, mentorship, and planned generosity.
- **Recognition & Legacy:** Highlighting existing benefactors and sharing personal stories was seen as a way to inspire participation.

These words reflect a clear focus on building understanding and commitment around becoming a TRF Benefactor. **Education and awareness** are foundational, as many clubs emphasized the importance of informing members about what it truly means to be a benefactor. There is also strong interest in **estate planning and endowment**, particularly the common \$1,000 minimum contribution through legacy giving. Clubs are eager to create a culture of **encouragement and support**, fostering mentorship and conversations about planned generosity. Finally, **recognition and legacy** play a vital role—by honoring current benefactors and sharing their personal stories, clubs hope to inspire others to make lasting commitments to The Rotary Foundation.



Rotary International District 5340 Enhance Participant Engagement Action Plan

Goal: To support every club in District 5340 to engage the highest number of members in meaningful service projects during the Rotary year, ensuring participation from at least 50% of each club's membership.

I. Planning & Structure

1. **Establish Clear Participation Targets**
 - Set annual goal: 50%+ of members participate in at least one service project.
 - Encourage clubs to aim for 100% engagement where feasible.
 2. **Project Brainstorming at Start of Year**
 - Conduct a visioning or brainstorming session to identify 5–7 high-impact, member-driven projects.
 - Appoint a dedicated Community Service Chair to lead planning and tracking.
 3. **Service Calendar**
 - Develop a club service calendar at the start of the year with at least one activity per month.
 - Include both hands-on and fundraising-based opportunities.
 4. **Joint Club & Multi-Club Projects**
 - Encourage inter-club collaborations to broaden engagement and share resources.
-

II. Promotion & Awareness

1. **Pre-Promotion of Service Projects**
 - Announce projects in advance with clear roles, dates, and goals.
 - Use emails, websites, social media, and printed materials.
 2. **Personal Invitations & Follow-Ups**
 - Service Chairs and Presidents personally invite less-engaged members.
 - Assign member buddies or accountability partners for encouragement.
 3. **Highlight Impact**
 - Share before/after photos, testimonials, and impact stories.
 - Celebrate the results of each project in club meetings and newsletters.
-

III. Member Engagement & Accountability

1. **Committee Participation Model**
 - Require each member to join at least one service-related committee.
 - Assign committee chairs to track and encourage involvement.

2. **Tracking System**
 - Use sign-in sheets or digital tracking tools to log participation.
 - Ensure each member is only counted once for the annual metric.
 3. **Point System & Recognition**
 - Create a point system that awards participation and highlights engaged members at meetings.
 - Offer incentives such as awards, certificates, or shout-outs.
 4. **“First Service” Initiative for New Members**
 - Invite all new members to participate in a service project within their first 90 days.
-

IV. Innovation & Flexibility

1. **“Service Saturdays” Initiative**
 - Launch monthly or quarterly events that are open to families and partners.
 - Rotate types of service: environment, youth, literacy, food insecurity, etc.
 2. **Feedback and Project Selection**
 - Regularly survey members on the kinds of service projects they want to engage in.
 - Support initiatives proposed by members tied to personal passions or charities.
 3. **Alternative Service Options**
 - Offer virtual or flexible service activities for busy professionals or caregivers.
-

V. District-Level Support

1. **Resource Toolkit**
 - Provide clubs with a sample service calendar, promotional templates, and reporting tools.
 - Offer service project ideas tied to Rotary’s Areas of Focus.
 2. **Club Collaboration & Sharing**
 - Create opportunities for clubs to share their best service projects at district events.
 - Offer recognition for most innovative and impactful projects annually.
 3. **Youth & Partner Engagement**
 - Encourage collaboration with Interact, Rotaract, and local youth organizations.
 - Promote family-inclusive and multigenerational service models.
-

Key Metrics for Success:

- % of members participating in at least one service activity per club
 - Total number of distinct service projects completed across the district
 - Average participation rate by club size
 - Member satisfaction with service opportunities (via surveys)
-

Call to Action:

Service is the heart of Rotary. By creating intentional, inclusive, and impactful opportunities, we can ensure every Rotarian finds a meaningful way to serve.

Together, we take action that changes lives.



Most Frequent Themes:

- Service: Rotary's core value with monthly hands-on projects like Little Libraries.
- Projects: Impactful and engaging initiatives tracked for participation.
- Members: Aim for full participation using recognition and flexibility.
- Club: Begin with brainstorming and involve committees and satellite clubs.
- Community: Align projects with local needs and member passions.

These words reflect the **core values, strategic priorities, and engagement tools** at the heart of the Rotary District 5340 Enhance Participant Engagement Action Plan. These themes highlight a culture of intentional and inclusive service where every Rotarian can make a difference.



Rotary International District 5340 Action Plan to Increase Our Ability to Adapt

Goal: To foster club-level adaptability through the creation, implementation, and continuous refinement of strategic plans aligned with the Rotary Action Plan priorities—setting a culture of long-term vision, accountability, and progress.

I. Strategic Planning Culture & Commitment

1. Annual Strategic Planning Retreats

- All clubs will host a strategic planning session or board retreat annually.
- President, President-Elect, and at least one board member to lead this process.

2. Baseline Strategic Plan Adoption

- Each club must adopt or update a foundational strategic plan aligned with Rotary's 4 Action Plan priorities.
- Minimum plan elements: Membership, Service, Foundation Giving, Public Image, and Club Operations.

3. 3-Year Rolling Planning Framework

- Encourage clubs to maintain a 3-year strategic outlook, updated annually.
- Include goals for sustainability, growth, fundraising, and leadership pipeline development.

4. Club-Wide Involvement

- Gather feedback from all members via surveys, town halls, or brainstorming sessions.
 - Assign every club member a role or objective tied to strategic priorities.
-

II. Leadership Pipeline & Succession

1. President-Elect Development

- Each incoming president works with their predecessor to review and update the strategic plan.
- Incoming presidents to convene a transition planning team to ensure alignment.

2. Strategic Planning Committees

- Form dedicated committees to support planning, track progress, and keep the plan alive.
- Collaborate with Past Presidents, Foundation Chairs, Membership Chairs, and Service Leads.

3. Leadership Training Integration

- Include strategic planning modules in PETS, District Assemblies, and Area-level events.
-

III. Monitoring, Tracking & Accountability

1. Quarterly Goal Review

- Club boards review strategic goals quarterly and update progress in Rotary Club Central.
- Track metrics like member engagement, fundraising progress, and service participation.

2. Scorecards & Dashboards

- Encourage clubs to maintain a simple tracking sheet or dashboard.
- Share progress and wins with all members.

3. Public Communication of Impact

- Include key milestones and strategic impact stories in newsletters, websites, and social media.
-

IV. District Support & Tools

1. Strategic Planning Toolkit

- District to provide a step-by-step resource packet with templates, goal sheets, and sample plans.

2. District Action Plan Champions

- Assign Action Plan Champions to assist clubs in writing, launching, and refining plans.
- Offer office hours or coaching sessions for club leadership.

3. Highlighting Innovation & Success

- Recognize clubs that demonstrate strategic agility and innovation.
 - Share top-performing examples at District Conference and via communications.
-

Key Metrics for Success:

- % of clubs with updated strategic plans in Rotary Club Central
 - Number of clubs conducting annual retreats or reviews
 - % of club presidents trained in strategic planning tools
 - Number of strategic goals tracked quarterly
-

Call to Action:

Adaptable clubs are sustainable clubs. By embedding strategic planning into the fabric of each Rotary club, we ensure our ability to grow, serve, and lead well into the future.

Together, we plan boldly and adapt wisely.



Rotary International District 5340 Other Club Goals: Honoring the Work of Our 62 Clubs

Objective: To recognize and support the diverse and visionary work being done across District 5340 that goes beyond RI's priority goals. These initiatives reflect the passion, innovation, and service-oriented spirit that makes Rotary impactful at the local, regional, and global level.

I. Club Engagement, Belonging & Visibility

- **Social & Fellowship Events:** Clubs are hosting monthly mixers, "Thirsty Thursdays," and community socials to build stronger bonds.
 - *Support Tip:* Share event planning templates, district calendar collaboration, and promote inter-club socials.
 - **Public Awareness:** Clubs are expanding social media, launching newsletters, and hosting community speaker series.
 - *Support Tip:* District PR Committee offers toolkits and spotlight features for broader impact.
 - **Networking with Purpose:** Clubs are exploring Rotary's professional development appeal while staying true to Service Above Self.
 - *Support Tip:* Highlight member business directories and service-related networking opportunities.
-

II. Youth & Education Programs

- **Interact & Rotaract Growth:** Many clubs are expanding or launching new Interact clubs and supporting college-based Rotaract.
 - *Support Tip:* Offer training for school liaisons, partner with RYLA/Youth Services chairs, and celebrate club mentorship wins.
 - **RYLA & Scholarship Initiatives:** Clubs are sending students to RYLA, sponsoring 4-Way Test speech contests, and awarding scholarships.
 - *Support Tip:* Encourage co-sponsorships and storytelling through video tributes to inspire donors.
 - **Youth-Led Projects:** Some clubs involve Interact students in service and planning (e.g., TJ builds, literacy, school drives).
 - *Support Tip:* Showcase youth-run projects during district events and on social platforms.
-

III. Service Projects & Community Support

- **Community Impact Projects:** Clubs are relaunching "Home Team" services for seniors, hosting Relay for Life events, and organizing local build-a-bike days.
 - *Support Tip:* Share recognition models and partnership templates to expand reach.
 - **International Service:** Binational TJ builds, computer labs, and medical missions exemplify Rotary's global mission.
 - *Support Tip:* Promote District-supported Global Grants and binational collaboration days.
 - **High-Frequency Engagement:** Many clubs run 12–16 service projects annually with consistent member participation.
 - *Support Tip:* Use service reporting dashboards and district-wide recognitions to boost morale and visibility.
-

IV. Club Growth, Succession & Innovation

- **Rotary Club Strategic Planning:** Several clubs are creating new strategic plans or updating legacy ones, often via board retreats.
 - *Support Tip:* Offer peer-review support through Area Governors and Strategic Planning workshops.
 - **Club Governance & Structure:** Some clubs are working on bylaws revisions, onboarding improvements, and succession planning.
 - *Support Tip:* District can facilitate governance workshops and promote shared leadership models.
 - **DEI & Membership Innovation:** Efforts include diversifying leadership, rethinking lunch models, and adding flexibility to meeting formats.
 - *Support Tip:* Highlight inclusive best practices and honor clubs who lead in this area.
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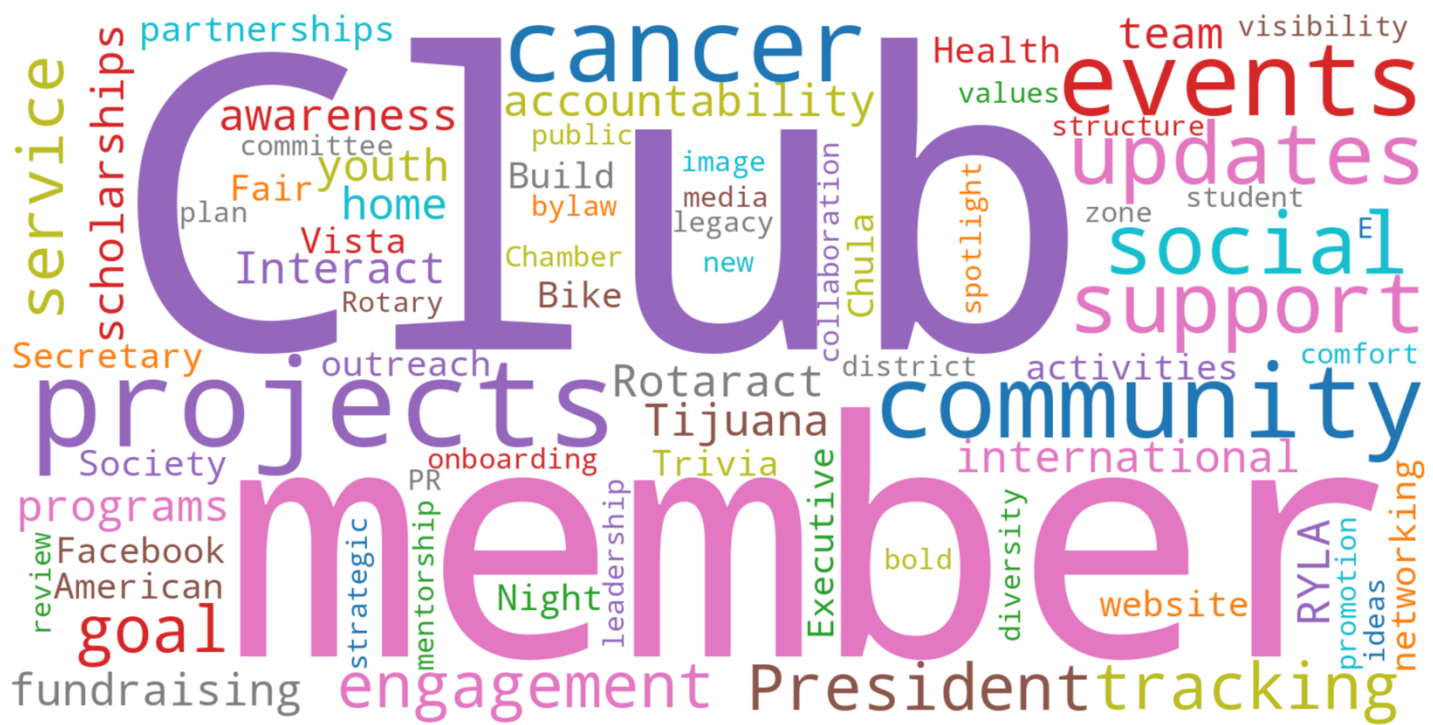
V. Special Projects & Bold Goals

- **Legacy Projects:** Several clubs are pursuing high-impact multi-year community initiatives.
 - **Fundraising Expansion:** Trivia nights, public health fairs, and themed galas are helping clubs meet giving goals.
 - **Rotary-Community Partnerships:** Active involvement with local chambers, city councils, and nonprofits is increasing Rotary's visibility.
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Final Words of Appreciation

District 5340 salutes the heart, hustle, and hope that defines each club's "other" goals. From classroom support to cataract surgeries, you are showing the world what people of action can do. We see your work. We celebrate your commitment. And we thank you for living Rotary's values—every single day.

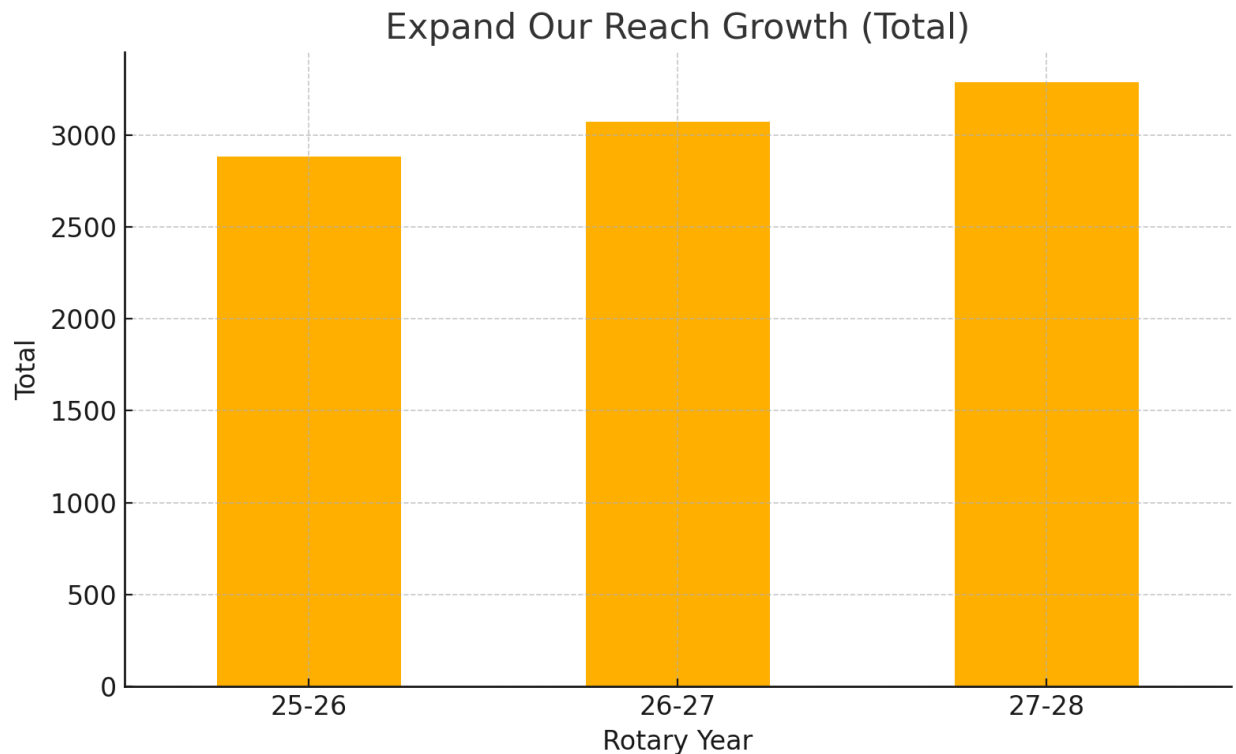
Together, we honor tradition, ignite innovation, and serve with purpose.



Most Frequent Themes:

- **Member & Club** – Central to all efforts, emphasizing involvement and leadership.
- **Projects, Events, Service** – Highlighting a wide variety of service and fundraising activities.
- **Community, Youth, Engagement** – A focus on public impact, student leadership, and inclusivity.
- **Tracking, Accountability, Updates** – Prioritizing strategic progress and transparency.
- **Rotaract, Interact, RYLA, Scholarships** – Strong commitment to youth development.

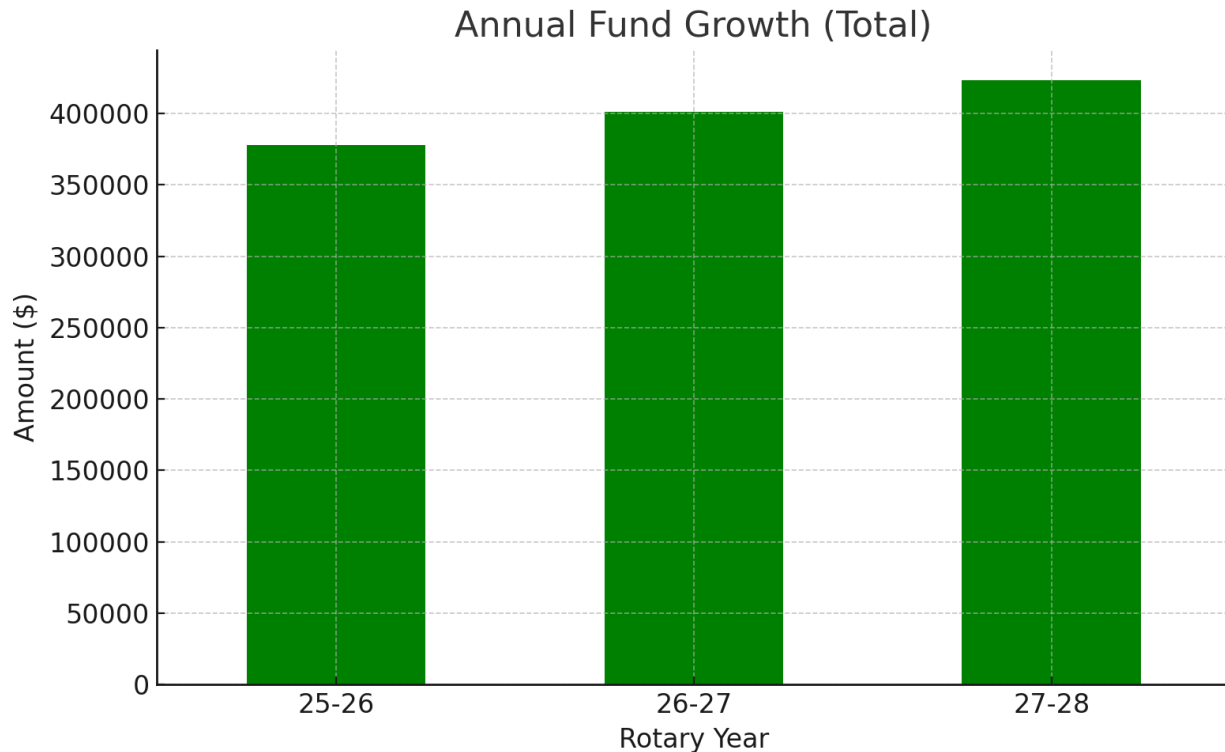
Together, these “Other Projects” reflect a well-rounded, mission-driven Rotary club—one that is connected to its community, constantly growing, and united by the shared purpose of *Service Above Self*.



The "Expand Our Reach" Rolling Goal shows steady and meaningful growth over three years:

- **2025-26:** 2,883
- **2026-27:** 3,072
- **2027-28:** 3,288

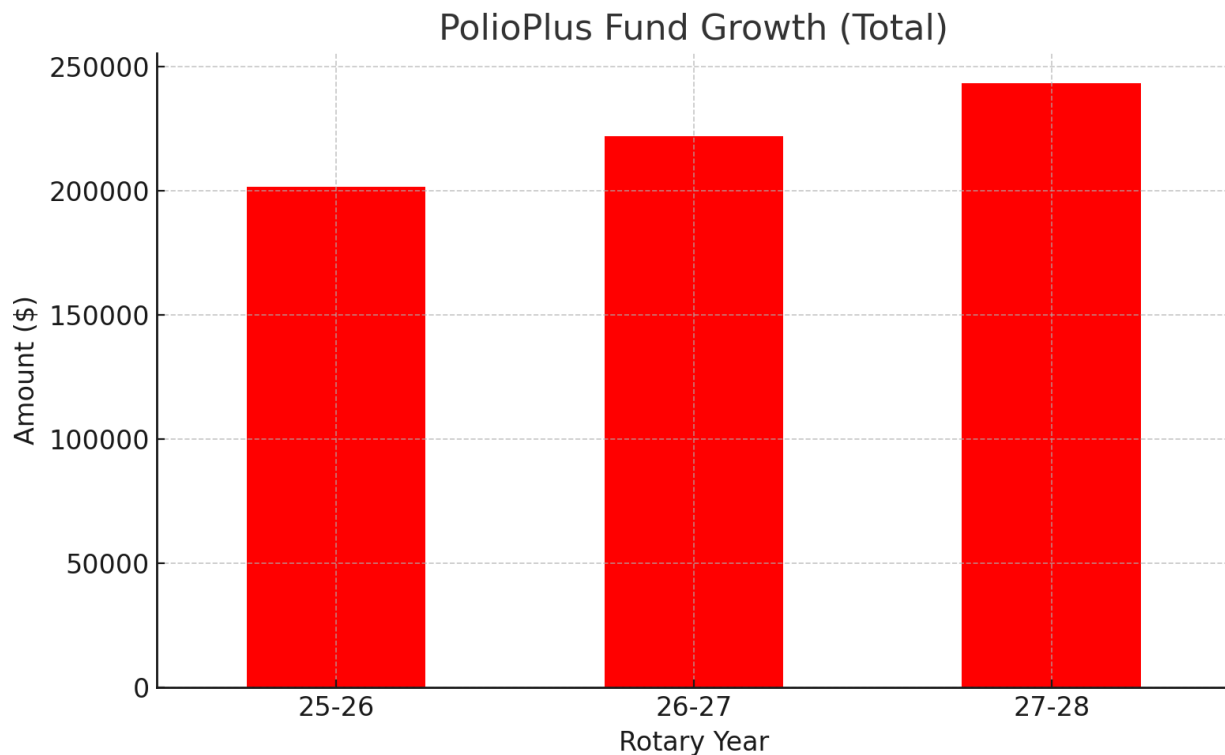
This reflects a **14% total increase** over the three-year period, indicating consistent progress in engagement, outreach, and member expansion efforts across the district.



The Annual Fund Contributions Rolling Goal show consistent and healthy growth over three years:

- **2025-26:** \$378,090
- **2026-27:** \$400,960
- **2027-28:** \$423,330

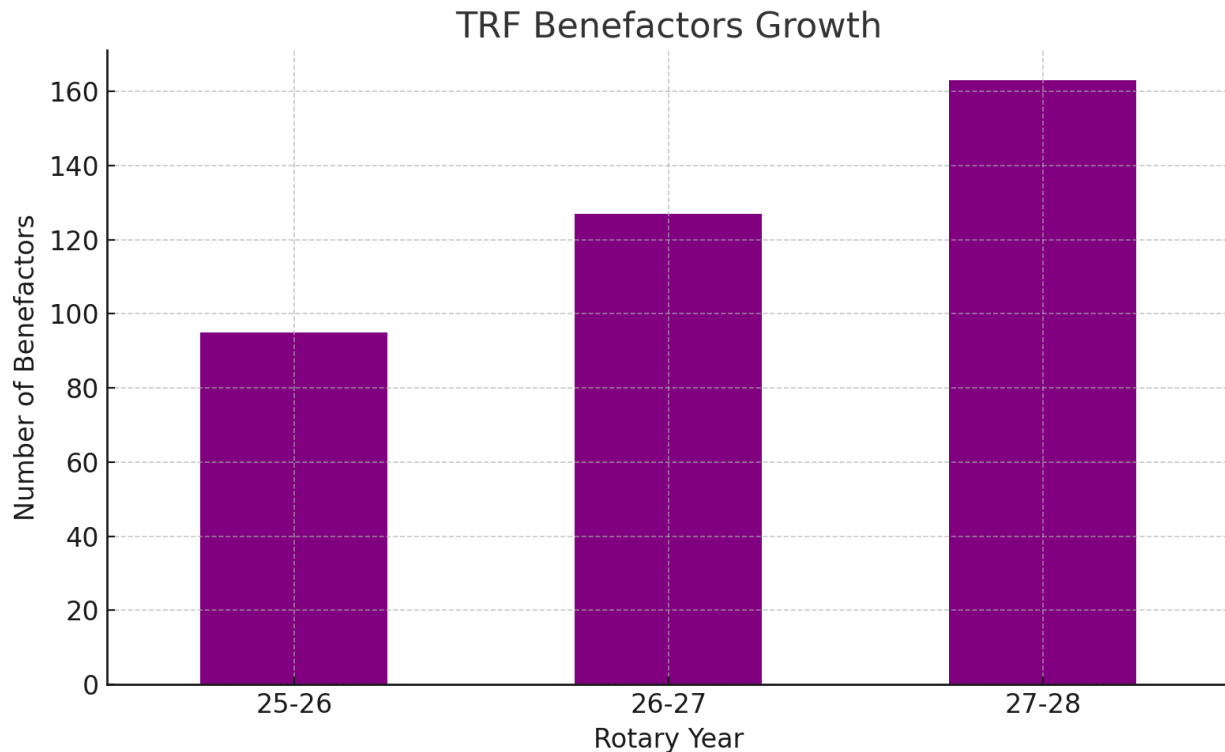
This represents an overall increase of **12%**, demonstrating strong donor engagement and effective fundraising strategies across the district. The trend reflects a growing commitment to support Rotary Foundation priorities year over year.



PolioPlus contributions Rolling Goal projects steady year-over-year growth:

- **2025-26:** \$201,666
- **2026-27:** \$221,980
- **2027-28:** \$243,429

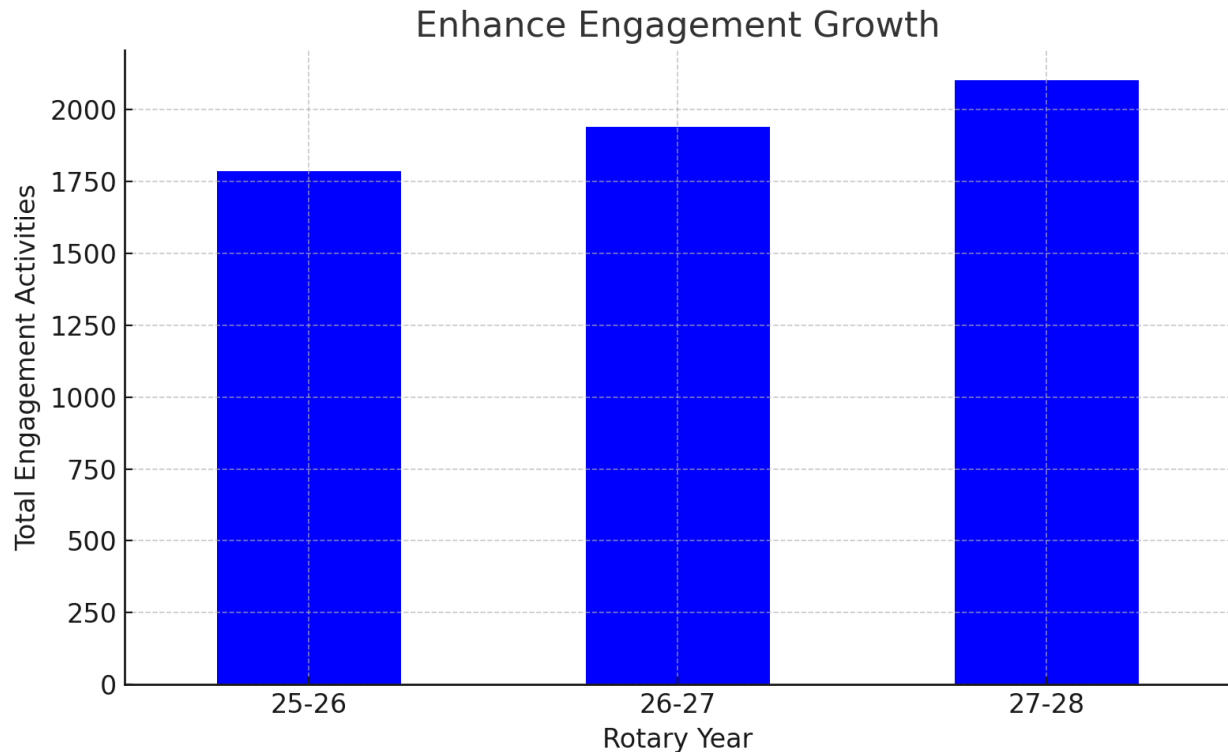
This reflects a **21% total increase** over three years, underscoring the district's growing commitment to Rotary's global fight against polio through consistent fundraising and donor engagement.



TRF Benefactors Rolling Goal shows steady growth across three years:

- **2025-26:** 95
- **2026-27:** 127
- **2027-28:** 163

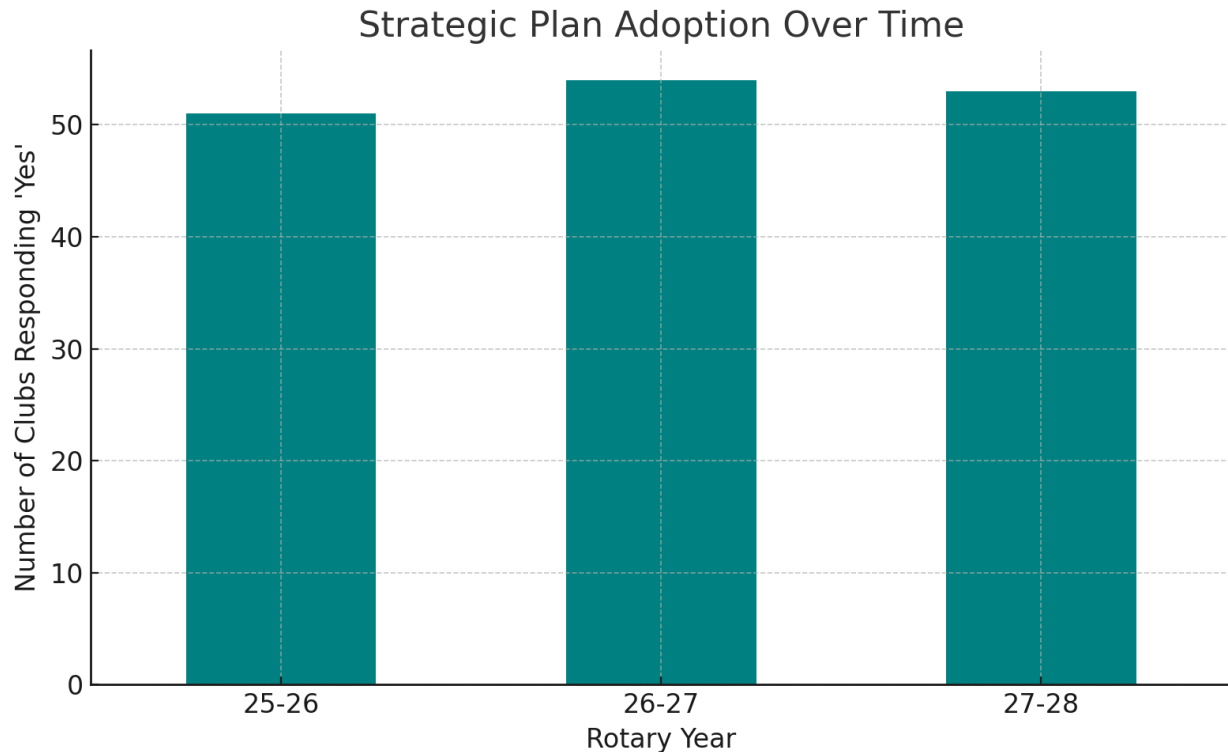
This marks a **72% increase** in benefactors over the period, reflecting successful education, recognition, and engagement strategies that are inspiring more members to make legacy commitments to The Rotary Foundation. **NOTE: A few stretch goals appear to be unrealistic.**



Enhance Engagement activities show opportunities to serve steadily over the three-year period:

- **2025-26:** 1,785
- **2026-27:** 1,939
- **2027-28:** 2,103

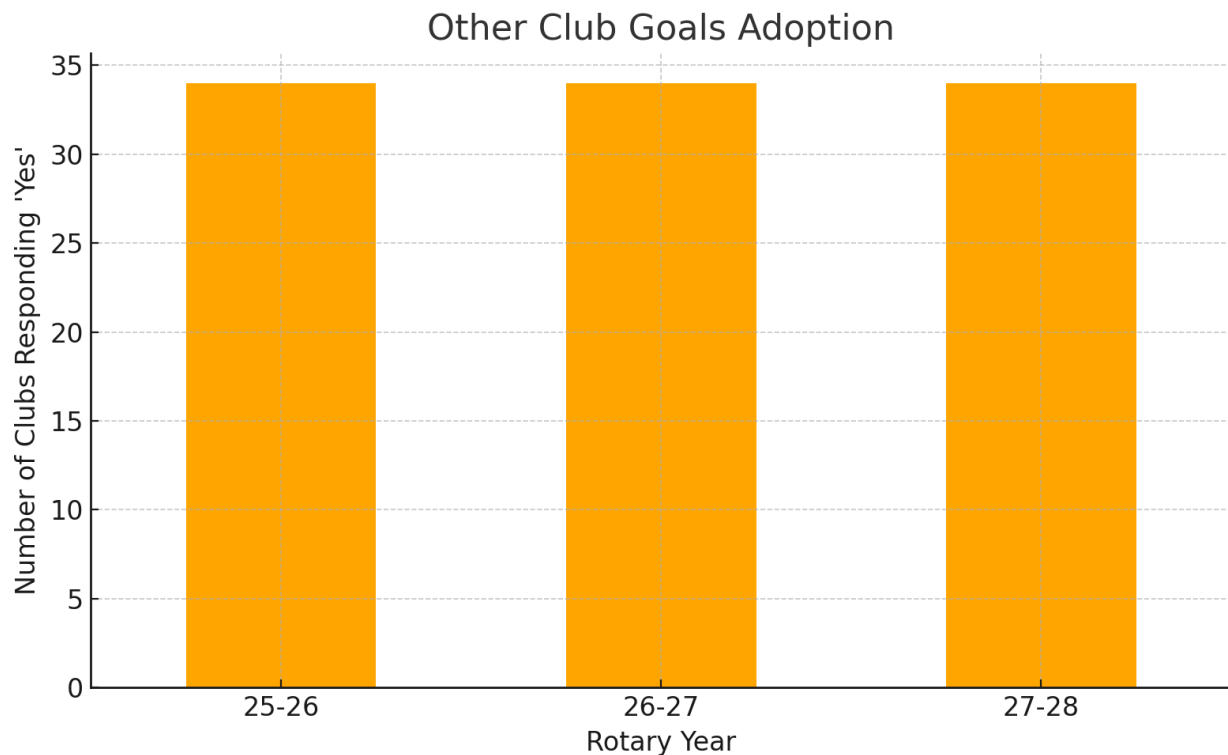
This reflects a **18% increase** in total engagement activities, indicating a successful effort to expand member involvement through service, social events, outreach, and community connections across the district.



Strategic Plan adoption across clubs remained consistently high:

- **2025-26:** 51 clubs
- **2026-27:** 54 clubs
- **2027-28:** 53 clubs

This indicates that over **85% of clubs** are consistently embracing long-term planning practices, reinforcing a strong culture of goal setting, continuity, and accountability within the district.



"Other Club Goals" adoption to do more projects to hold steady over the three-year period:

- **2025-26:** 34 clubs
- **2026-27:** 34 clubs
- **2027-28:** 34 clubs

This consistent participation highlights that a strong core of clubs is actively pursuing additional customized goals—such as youth programs, community projects, or local partnerships—that go beyond standard district metrics, reinforcing creativity and autonomy in club planning. Many more clubs can do more.