

District 5040 Strategic Plan 2022-2025

(completed via Zoom meetings due to Covid restrictions)

The Object of District 5040

To provide effective and efficient support to clubs and its members in all aspects of Rotary Service

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A: District Mission, Vision and Values

Mission: *(What's our purpose?)*

- support the clubs in District 5040 in fulfilling the object of Rotary
- promote the concept of service as a worthy endeavor
- advocate support for the Rotary Foundation
- strengthen and expand Rotary to communities in District 5040
- facilitate joint club and district projects

Vision: *(A clear and compelling image of the future)*

Rotary District 5040 and the clubs we serve are people of action. We are known for our leadership that provides, positive, inspiring, and collaborative support for clubs working to improve lives of those globally and in our communities through volunteer service. We value our relationships and participation while offering personal learning and fun for the members.

Values: *(What guides our behaviour?)*

Fellowship: Service; Integrity; Diversity; Leadership

B: District Top Priorities

District Top Key Priorities

| | |
|---|--|
| 1 | Provide effective and efficient support to clubs – the heart of Rotary – in all they do |
| 2 | Increase the impact of The Rotary Foundation through giving and in service projects |
| 3 | Promote and increase membership in Rotary and Rotaract through District-wide initiatives and individual club support |
| 4 | Improve internal and external communications by developing a District Public Image Committee and achieving effective yet streamlined links between and among District committees, and the clubs and Assistant Governors they serve |
| 5 | Plan and implement a District approach to Diversity, Equity, and Inclusion that emphasizes and facilitates clubs' member-driven goals |
| 6 | Expand peace related service and engagement by building on exiting initiatives and expanding the scope of our peace actions through District-wide initiatives and individual club opportunities |
| 7 | Promote, increase, and support youth programs to extend the reach of youth related services opportunities that District and clubs provide for the next generation(s) |

Rotary International Four Priorities

- **Increase Our Impact**
- **Expand Our Reach**
- **Enhance Participant Engagement**
- **Increase Our Ability to Adapt**

C: Executive Summary of Key Strategies for the Areas of Focus

Membership:

To grow Rotary membership and increase member engagement and the vibrancy of clubs

The Rotary Foundation:

To Increase our Impact by keeping all clubs highly knowledgeable and informed as it relates to The Rotary Foundation. To maximize access to District and Global Grants through effective administration and collaboration amongst clubs in District 5040 (Increase our Impact).

Youth

To promote Rotary based youth programs to encourage participants to progress in their Rotary knowledge and activities, build integration and succession, by continuing to be active in Interact, RYLA and Youth Exchange. Support the clubs in the area of risk management through provision of policy and support resources and encourage full due diligence

Public Image

To support clubs and District committees in increasing the understanding and commitment of various stakeholders, including club leaders and members, District leaders and community leaders in achieving Rotary strategy through its service projects and activities.

Rotaract to engage and inspire the 48 clubs in District 5040 to support and nurture their Rotaract Clubs. To create a “Learning Exchange” where Rotary and Rotaract Clubs come together to provide “Service for All”!

Diversity Equity and Inclusion

Clubs become more vibrant and sustainable through Diversity Equity Inclusion, engaging members through their own self-directed plans.

Operations/administration/finance

Enable District to be efficient and effective in achieving its purpose to support clubs. Achieve excellent internal communications. Focus resources on strategic objectives while minimizing the need to use human and financial resources on administration

Learning and Development:

Provide support and resources for our District committees to provide Rotarians with the knowledge & skills that will enhance their Rotary experience.

D: Strategic Planning Areas of Focus individual plans;

Strategic Focus # 1

Committee Name: *District Membership Committee*

Committee Chair: *Danison Buan*

Committee members: *Tom Smith, Nancy Eidsvik, Jocelyn Vissia, Shirley-Pat Chamberlain, Samantha Kwong, Marilyn Anderson, Tanya Hall, Frank Peabody, William Tsai, Heather Josephine Pue, Erin Lee, Robbie Bishop, Kamil Kanji, Ardath Paxton, Ron Malmas, Tony Mori, Katrin Widodo*

Strategic Objective: *To grow Rotary membership and increase member engagement and the vibrancy of clubs*

| Current year Goals (SMART) | Lead | Target Date | Status/Updates |
|---|-----------------------------|----------------------------------|-------------------------|
| Membership Retention & Extension – To develop Membership Program | Tom Smith and Nancy Eidsvik | July 1 st , 2022 | Completed |
| Club Outreach – To visit 48 clubs in the district to get familiar with Rotary members (in person or join virtually) and be available to answer club questions | Danison Buan | December 31 st , 2022 | Ongoing, 8 clubs so far |

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|---|-------------------------------|----------------------------------|---|
| District Membership Forum (Quarterly Training) – to hold four Quarterly Membership Training in a year attended by a representative of the club | Danison Buan | December 31 st , 2022 | Ongoing |
| Engagement for Alumni – to create an event for improving engagement among alumni | Tanya Hall | July 1 st , 2022 | Ongoing |
| Starting An Innovative Club - to develop Satellite Rotaract Club to develop cause-based clubs | Danison Buan | July 1 st , 2022 | Ongoing |
| Membership Lead Build-up – to fix RI leads workflow and further develop pilot leads funnel with facebook ads in Burnaby | Frank Peabody | July 1 st , 2022 | Ongoing |
| Leaders Connect – to create a mentorship program that matches 25 Rotaracts with 25 Rotarians by the end of this year, Interact Post-Secondary 101 Session | Jocelyn Vissia | December 31 st , 2022 | Ongoing |
| District Speaker Series – to hold six sessions in one year, our goal is to reach at least 50 people showed up by the end of this year | Marilyn Anderson | December 31 st , 2022 | Ongoing, 20 people showed up in the first session |
| DEI – see separate Focus area #6 in this document | Ardath Paxton | July 1 st , 2022 | Ongoing |
| Membership Pilot – to train Danison and Jocelyn in methodology in membership pilot | Shirley-Pat Chamberlain | December 31 st , 2022 | Ongoing |
| Governance & Board Development Succession Planning - Tanya Hall and Tom Smith are looking for chairs To develop Board Training, Onboarding, Board Retention, Member Exit, and Succession Planning | William Tsai and Danison Buan | December 31 st , 2022 | Ongoing |
| | | | |

| 2 to 3 Years Goals (SMART) | Lead | Target Date | Status/Updates |
|--|------------------|----------------------------------|-----------------------|
| Memberships – to grow district membership by 10% to help clubs with less than 20 members to grow new members by promoting clubs events (directory) ? | Danison Buan | December 31 st , 2023 | Ongoing |
| Events Directory? – to showcase the diversity of each club to attract potential new members | Danison Buan | December 31 st , 2023 | Ongoing |
| District Speaker Series – to hold six sessions in one year, 20 people showed up in the first session, our goal is to reach at least 100 people showed up in the next two years | Marilyn Anderson | December 31 st , 2023 | Ongoing |
| Leaders Connect – To have the model adopted to other districts | Jocelyn Vissia | December 31 st , 2023 | Ongoing |

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Strategic Focus #2: Foundation Committee (including district and global grants)

Committee Chair: Lorne Calder

Committee members: Ian Grant, Bill Hellyer, Brian Finley, Dolly Hilton, Gabor Gasztonyi, Del Paterson (Zone), Gary Shearer (Zone)

Strategic Objective: The role of this committee is to **Increase our Impact** by keeping all clubs highly knowledgeable and informed as it relates to the greatest partnership in Rotary- The Rotary Foundation. To maximize access to District and Global Grants through effective administration and collaboration amongst clubs in District 5040 (Increase our Impact).

| Current year Goals (SMART) | Lead | Target Date | Status/Updates |
|---|----------------|------------------------|-----------------------------|
| Increase Basic Understanding of Foundation: | Vice Chair | May 31 | Monthly/Quarterly reporting |
| Foundation 101 course offering- focus on EREY/Sustaining Member/WHY | Bill/Ian/Kelly | May 2022/February 2023 | Semi Annually |
| Quarterly Foundation Forums | Chair | Quarterly | District Calendar |
| District Presenters on Foundation- Speakers Bureau | Nancy | On Going | |
| Increase Awareness and Contributions to PHS, Polio Society, Bequest Society, Major Gifts | Chair | Year | Monthly/Quarterly reporting |
| Area Thank-You Dinners | Chair or DG | March 2023 | |
| Certificate of Appreciation | Chair | Oct 2022 | |
| Recognition at District Conference- PHS/Polio etc... | Chair or DG | May 2022 | |
| Increase Participation Rates to EREY/ Sustaining/Rotary Direct/PH | Committee | | Monthly reporting |
| Increase EREY participation from 46% to 52% to 55% | Committee | Ongoing | Monthly/quarterly reporting |
| Increase PHS from 90 to 105 to 120 | Committee | Ongoing | Monthly/quarterly reporting |
| Increase Rotary Direct from 153 to 170 to 200 | Committee | Ongoing | Monthly/Quarterly Reporting |
| To keep per capita APF giving above \$200 | Committee | Ongoing | Monthly/Quarterly reporting |
| Increase Polio Plus Donations | Polio Chair | | |
| Monthly Newsletter | Polio Chair | Ongoing | Monthly |
| Annual Area or Club Events- multiple formats | Clubs | District Calendar | Calendar |

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|---|-------------|---------|-----------------------------|
| To achieve annual donations of at least \$100,000 US | Committee | Ongoing | Monthly/Quarterly Reporting |
| To submit request for % of annual fundraising for survivor needs | Polio Chair | June 30 | RI Response |

| 2 to 3 Years Goals (SMART) | Lead | Target Date | Status/Updates |
|---|--------------------|--------------------|-----------------------|
| To Grow the Endowment Fund | Committee | | |
| Triple Crown Award | Chair | 2023/2024 | |
| Million Dollar Dinner template (every 3 years) | Assigned Committee | | |
| To Increase endowment from \$3.7 million to \$5 million | Chair/GT Eam | | |
| To Increase awareness and sustainability of donations to the Rotary Foundation | Committee | | |
| Major Area Event planning- Lower Mainland | Club Assignment | November | |
| Global Grant Understanding positive impacts | Committee | Club Assembly | |
| District Grant understanding positive impacts | Committee | Club Assembly | |
| To increase Collaboration amongst clubs on District and Global Grants | Brian/Bill | On-Going | |
| Showcase- Collaboration/Large Scale Projects | Webmaster Team | April 2023 | |
| 1 st Nations Partnerships- Truth and Reconciliation | Peace Committee | July 2024 | |

**Strategic Focus #3:
Young Leaders (Chair: Lynda Rocha)
Members:**

- Interact Chair Val Liddle
- RYLA Chair Lynda Rocha/James Fox
- YEX Chair Gina Rawson/Bob Killbery
- STEP Co-coordinators Leone McHugh
- NGSE Coordinator Sylvie Barton
- Compliance Chair Ron Davies/ Sarah Johnstone-Davies/Robert Crawford

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- Youth Protection Officer

Strategic Objectives:

- Cross promote between Rotary based youth programs to encourage participants to progress in their Rotary knowledge and activities, build integration and succession, by continuing to be active in Interact, RYLA and Youth Exchange
- Support the clubs in the area of risk management through provision of policy and support resources and encourage full due diligence

| Current year Goals (SMART) | Lead | Target Date | Status/Updates |
|---|-----------------|--------------------|-----------------------|
| <u>Committee Administration / Resources</u> | | | |
| Develop Terms of Reference for the committee | Lynda | | Completed |
| Update plan twice a year ongoing reviews | Lynda | ongoing | October and March |
| Develop resource position Club Based Youth Programs | Lynda | June 2022 | |
| Create a support system to assist transition from Interact to Rotaract and beyond | | ongoing | |
| <u>Training and Development</u> | | | |
| Develop consistent training standards for each core program | All | ongoing | |
| Develop training for committee on policies, and for new committee members | Lynda | Sept 2022 | |
| <u>Risk compliance/Legal</u> | | | |
| Increase members with CRC's | Lynda/ Ron | ongoing | |
| Have each club name a youth officer on Club Runner | Lynda | June 2022 | |
| <u>Marketing and Promotion</u> | | | |
| Develop a consistent and unified Marketing Plan for all youth programs | All | Sept 2022 | |
| <u>Interact:</u> | | | |
| Creation of District Youth Committee comprised of Interact members | Val | ? | |
| Creation of a one day conference (3-4 hours in length) of motivational speakers | Val | Spring 2022 | |
| Create a district wide international project with 6-8 interact members participating hands on | Val | ? | |
| <u>RYLA</u> | | | |
| Continue all three programs as Covid permits | Lynda/ James | Spring 2022 | |

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| <u>Youth Exchange</u> 8 out bound and 8 inbound | Gina /Bob | June 2022 | |
| STEP goal of 2 students | Leone | June 2022 | |
| <u>Finance/ Fundraising</u> Set budgets for individual programs and provide to district by Jan 31 annually | Lynda/All | Completed | |
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| 2 to 3 Years Goals (SMART) | Lead | Target Date | Status/Updates |
|---|--------------------------|--------------------|-----------------------|
| <u>Committee Administration / Resources</u> Develop and support the position of District Protection officer (Job description on hand) | ? | July 2022 | |
| Develop a social media potion for the youth committee | ? | Jul 2023 | |
| | | | |
| <u>RYLA</u> Continue with three programs – face to face when approve | Lynda/James | 2023 | |
| Begin to introduce Indigenous Truth and Reconciliation topics to curriculums for all RYLAs in 2023 | Lynda/James | 2023 | |
| Increase in-person RYLA participant numbers over 2019 for all RYLAs in 2023 | Lynda/James | 2023 | |
| Increase in diversity and inclusion initiatives for staff training and supporting accessibility for RYLA participants in 2023. | Lynda/James | 2023 | |
| <u>Youth Exchange</u> | | | |
| Provide YEO training specific to YEAH | Gina /Bob | Dec 2022 | |
| Implement the YEAH data base for YEX in D5040 | | June 2023 | |
| <u>Finance/ Fundraising</u> Set budgets for individual programs and provide to district by Jan 31 annually | Committ ee chair and All | Jan 31 each year | |
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| <u>Risk compliance/Legal</u> Continue work on CRC compliance | Lynda/ Ron | ongoing | |
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Strategic Focus #4:

Committee Name: *Public Image Committee*

Committee Chair: *Peter Roaf, Interim*

Committee members: *to be determined*

Strategic Objective: *Increased engagement of, and collaboration among, club and District leaders in achieving club and District strategy.*

NOTE: The purpose of the Public Relations and Public Image Committee in District 5040 is to support clubs and District committees in increasing the understanding and commitment of various stakeholders, including club leaders and members, District leaders and community leaders in achieving Rotary strategy through its service projects and activities.

| Current year Goals (SMART) 2022-23 | Lead | Target Date* | Status/Updates |
|--|-------------|---------------------|-----------------------|
| Provide communication support to District and clubs in response to immediate needs NOTE: Lead to be determined as committee is re constituted | TBD | ongoing | |
| Complete research and development for an Internal Communication system among clubs and District committees | TBD | Q1 | |
| Complete research and development for a Member Communication system among clubs and District committees | TBD | Q1 | |
| Complete research and development for Public Relations system among clubs and District committees | TBD | Q1 | |
| Launch a Public Image and Public Relations consulting service for clubs and District committee | TBD | Q3 | |
| Evaluate new systems | TBD | Q4 | |
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| 2 to 3 Years Goals (SMART) 2023-24 and 2024-25** | Lead | Target Date | Status/Updates |
|--|-------------|--------------------|-----------------------|
| Revise and develop Public Image consulting service and systems | TBD | 2023-24 | |
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Strategic Focus # 5

Rotaract Chair: Ron Suzuki

Members: Arie Qi, Fatima Areej, Jocelyn Vissia

Strategic Objective: *the key priorities we like to achieve is to engage and inspire the 48 clubs in District 5040 to support and nurture their Rotaract Clubs. To create a “Learning Exchange” where Rotary and Rotaract Clubs come together to provide “Service for All”!*

| Current year Goals (SMART) | Lead | Target Date | Status/Updates |
|---|----------------------------------|---------------------|-----------------------|
| Implement a “sister” club program with strong clubs working with and assisting struggling clubs | Julia/Ron | Aug 2022 | ongoing |
| Encourage clubs to select President-elects and other club officers in a timely fashion at their AGM’s | Areej/Ariel/Thomas | March 2022 | ongoing |
| Develop an inclusivity action plan template for clubs | Areej/Ariel/Julia/Ron/Thomas | June 2022 | ongoing |
| Each Rotaract club has a Rotary liaison, and vice versa to improve communication and support | Julia/Ron | 2022/23 Rotary Year | ongoing |
| District quarterly socials, getting new membership involved in planning events | Ariel/Areej/Thomas Julia/Ron | Starting March 2022 | ongoing |
| Poster on 5040 Rotaract for presentation at social events | Ariel/Areej + district committee | March 2022 | ongoing |
| Speakers at District Meetings | Ariel/Areej/Thomas Julia/Ron | Starting May/June | ongoing |
| Training events for 5040 Rotaractors (leverage Rotaract marketing) | Julia/Ron | Before June 2023 | To be started |
| Enhance communication between assistant governors and Rotaracts | Ariel/Areej/Thomas Julia/Ron | Starting March 2022 | ongoing |

| 2 to 3 Years Goals (SMART) | Lead | Target Date | Status/Updates |
|--|------------------|--------------------|-----------------------|
| Increase membership by 30% over the next 3 years | Ron + DRR TBD | July 2025 | ongoing |
| Regional clubs to help host parts of PACE | Ron + DRR TBD | Summer 2023 | To be started |
| Annual training events for 5040 Rotaractors | Ron + DRR TBD | Starting 2023 | to be started |
| New Rotaract club every year | Ron + DRR TBD | Starting 2022 | ongoing |

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Strategic Focus #6:

Committee Name: *Diversity Equity Inclusion (DEI) Committee*

Committee Chair: *Ardath Paxton-Mann*

Committee members: *Danison Buan, Shirley-Pat Chamberlain, Marni Fraser, Dean Hsieh, Peter Roaf, Jimmy Yan, Amrit Randhawa, Carol Doyle (sec), Olivia Lee, Badhri Narayanan Leaf Alifu*

Strategic Objective: Clubs become more vibrant and sustainable through Diversity Equity Inclusion, engaging members through their own self-directed plans.

| Current year Goals (SMART) 2021-2022 | Lead | Target Date* | Status/Updates |
|---|-------------|---------------------|-----------------------|
| Achieve an active DEI program of members’ “belonging” and community outreach by at least 10 clubs | Ardath | Q4/2022 | |
| Address the 15 DEI survey recommendations and prepare a preliminary action plan | Ardath | Q4/2022 | |

| Current year Goals (SMART) 2022-23 | Lead | Target Date* | Status/Updates |
|--|-------------|----------------------------------|-----------------------|
| Support clubs in achieving their own, member-driven DEI goals through service as a DEI consulting “agency” | committee | Q1 2023 | |
| Achieve an active DEI program of members’ “belonging” and community outreach by at least 10 clubs/year | tbd | ongoing | |
| Complete action plan to address the 15 DEI survey recommendations | Ardath | Q3 | |
| Develop a collaborative relationship between the District’s DEI and Peace goals in support of clubs | tbd | Q4/2023 | |
| | | * add dates instead of Quarters? | |
| | | | |

| 2 to 3 Years Goals (SMART) 2023-24 and 2024-25** | Lead | Target Date | Status/Updates |
|---|-------------|--------------------|-----------------------|
| Achieve an active DEI program of members’ “belonging” and community outreach by at least 30 clubs | TBD | Q4 | |
| ** The new DEI Committee will develop longer term goals as it develops | | | |
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Strategic Focus #7:

District Operations/administration/finance

Chair: *Governor team*

Strategic Objective: Enable District to be efficient and effective in achieving its purpose to support clubs. Achieve excellent internal communications. Focus resources on strategic objectives while minimizing the need to use human and financial resources on administration.

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| Current year Goals (SMART) | Lead | Target Date | Status/Updates |
|---|---|--|-----------------------|
| Develop plan for website development and maintenance. | Website working group | September 2022 | |
| Streamline KPI system, emphasizing Rotary Club Central goals | G team (with KPI team) | June 2022 | |
| Review and streamline District organization chart and succession plan | DGE | December 2022 | |
| Policy committee to finalize Policy and Procedures document, (to include such items as the district's document retention and destruction policy, committee mandates etc) | Leigh Higinbotham/Penny Offer | ? | |
| Awards committee to ensure timely communication to clubs of awards criteria, both district and RI | Awards chair | Annually by February | |
| Develop a policy for district support of payment of PETS fees, i.e use of current surplus and future years consideration for club dues | DGE John | April 2022 | |
| Prepare an annual Strategic plan that incorporates clubs' RCC stats and is formally reviewed at least quarterly | John Bathurst | June 2022 | |
| Increase awareness and completion of CRC's in the district to a level of xx%. | Ron Davies/ Sarah Johnstone-Davies/ Robert Crawford | Quarterly reports to update leadership | |
| District committees to be communicating with clubs and providing appropriate support | G team and committees | ongoing | |

| 2 to 3 Years Goals (SMART) | Lead | Target Date | Status/Updates |
|---|----------------------------------|--------------------|-----------------------|
| Integrated website facilitating external and internal communication, with regular updating | PI/PR | June 2024 | |
| RCC/KPI providing clubs and District with data that effectively facilitates goal achievement while minimizing administrative load in so doing | G team with KPI team and Exec AG | December 2023 | |

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|--|-----------------------|---------|--|
| District committees to be communicating with clubs and providing appropriate support | G team and committees | ongoing | |
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Strategic Focus # 8

Committee Name: *Learning & Development Team*

Committee Chair: *Jan Gisborne*

Committee members: *PDG Darcy Long, DG Lorne Calder, DGE John Berry, DGN Shirley Pat Chamberlain, DGND Drew Antrobus, Bill Hellyer, Peter Roaf, Peter Clarke, Danison Buan, Kelly Zammit, Nancy Eidsvik, Del Paterson, Keith Tsukishima, Ardath Paxton Mann, Lynda Rocha*

Strategic Objective: Provide support and resources for our District committees to provide Rotarians with the knowledge & skills that will enhance their Rotary experience.

| Current year Goals (SMART) | Lead | Target Date | Status/Updates |
|--|-------------|--------------------|------------------------------------|
| Compile list of training done in other Districts | Jan | April 30/22 | |
| Co-ordinate scheduling of the various committees training timetable to minimize conflicting timing | Bill | ongoing | |
| Develop training strategy for Secretary, Executive Secretary & Treasurer positions | Bill | May 15/22 | Sub committee of District Trainers |
| Identify potential Learning champions in clubs to act as coordinators and liaison of Rotary Learning | Jan/Bill | June 2022 | |
| Undertake periodic reviews of reports from RI Learning Center to gauge activity | Peter R | June 2022 | |
| Liaise with Conference chair for learning component at the conference | Bill | ongoing | |
| Update recommended Learning Center courses | Jan | June 22 | |

| 2 to 3 Years Goals (SMART) | Lead | Target Date | Status/Updates |
|---|-------------|--------------------|-----------------------|
| Review all training in District -develop plan for who needs what training and when they need it | Jan | Nov. 2022 | |
| Learning Leader/champions in clubs | Jan/Bill | Nov. 2023 | |
| Review and update RLI or alternate leadership training | Nancy E | Oct 2022 | |
| Develop Strategy to increase % of My Rotary accounts to 65 % of District members | Bill/Peter | Nov. 2023 | |
| | | | |

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|--|-----|---------|--|
| Update recommended Learning Center courses | Jan | ongoing | |
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**Strategic Focus # 9: Peace and Mediators Beyond Borders (Chair: Ardath Paxton Mann)
Members; John Anderson, Gloria Staudt, others to be named**

Strategic Objective: Ardath assumes chair of this committee effective July 1, 2022 and will convene a committee shortly thereafter.

| Current year Goals (SMART) | Lead | Target Date | Status/Updates |
|--|---------------|--------------------|-----------------------|
| Mediators Beyond Borders (MBB) peace discussion facilitators: <ul style="list-style-type: none"> • Continue with practicums for those who have taken the course • Prepare a plan for future training and participation | John Anderson | tbd | |
| Peace Scholar program; <ul style="list-style-type: none"> • Continue active program of recruiting candidates and working with RI to assist with interviewing international candidates • Develop an approach that provides for delegation/segmentation of roles in this area to “spread the load” | Gloria Staudt | tbd | |
| | | | |

| 2 to 3 Years Goals (SMART) | Lead | Target Date | Status/Updates |
|--|-------------|--------------------|-----------------------|
| Having developed a committee work plan including consultations with club, and identified and initiated top two or three priority Peace initiatives | Ardath | Sept 2023 | |