



**2024 -
2028**

Action Plan & Strategic Vision

Action Plan – Rotary Cambridge Sunset

Rotary Cambridge Sunset developed this Action Plan to help define the strategies to shape our future, establishing our club as one that will be known by the following characteristics:

- Fun
- Good Camaraderie
- Progressive
- Approachable
- Respectful – open to new ideas
- Diverse and Inclusive
- Family-friendly and Welcoming
- Effective
- Integrity

With these characteristics, our club should be able to advance projects focused on our local community and other communities worldwide.

This Action Plan will evolve as we grow and identify new aspirations of Rotarians within our club. It is shaped by regular input from our members through surveys, planning sessions, knowledge of our community needs, support from our District 7080, and our club's committees.

This plan is to be reviewed on an annual basis and adjusted as we review our progress towards achieving our goals and develop annual objectives.

ALIGNMENT WITH ROTARY INTERNATIONAL

The strategic action planning review could align with the planning by each new President/Co-Presidents. It should consider the Rotary International (RI) annual theme, District 7080 goals and the Club's new Board of Directors.

Action plans or strategic plans are important for Rotary clubs. Research shows that clubs which develop and follow a strategic plan are stronger than clubs that do not. Their club members also view their clubs, and Rotary overall, more positively.

Rotary International's Strategic Planning Guide is recommended to help set long-term priorities as well as annual goals that support our club's strategic vision.

Rotary International has a simple process it recommends for Clubs to use. The phases ensure that the strategic plan makes our vision become actions and we evaluate our successes and progress.

STRATEGIC PLANNING PROCESS OVERVIEW

PHASE 1 — DETERMINE YOUR STATUS: HOW IS OUR CLUB DOING NOW?	PHASE 2 — DEVELOP A VISION: WHAT DO WE WANT OUR CLUB TO BE LIKE?	PHASE 3 — MAKE A PLAN: HOW CAN WE ACHIEVE OUR VISION?	PHASE 4 — TRACK PROGRESS: HOW CLOSE ARE WE TO OUR GOALS?
<ul style="list-style-type: none"> • Identify strategic issues to address • Determine club’s strengths and weaknesses • Assess member satisfaction and needs • Identify opportunities and challenges in the community 	<ul style="list-style-type: none"> • List five to seven characteristics you want your club to have • Create a vision statement 	<ul style="list-style-type: none"> • Set strategic priorities • Set annual goals • List the activities, timeline, and resources you’ll need 	<ul style="list-style-type: none"> • Monitor progress toward your annual goals • If you missed your targets, determine why • Adjust your action plans

ACTION PLAN

More than a century ago, Rotary pioneered a new model of service leadership grounded in person-to-person connections. Today, those connections are a network that spans the globe and bridge cultural, linguistic, generational, and geographic barriers with individuals who share the vision of a better world.

As People of Action, we understand that fulfilling that vision requires a plan.

This is Rotary’s Action Plan through 2024: to increase our impact, expand our reach, enhance participant engagement, and increase our ability to adapt.

The **ROTARY ACTION PLAN**

STRATEGIC INITIATIVES

INCREASE OUR **IMPACT**



Developing a consistent set of best practices and tools for measuring and sharing Rotary's Impact.

Rolling out Programs of Scale to provide us with a new framework for thinking about how we bring about change in the world.



Developing an evaluation framework that will help us make objective recommendations about what we should continue doing, start doing, or stop doing.

ENHANCE **PARTICIPANT ENGAGEMENT**



Taking a participant-centered approach—making sure our members and other participants know we value what they bring to Rotary.

Looking at ways to measure member engagement and satisfaction so we can better understand what people are getting out of their Rotary experience.



EXPAND OUR **REACH**



Developing a comprehensive plan of action with achievable, measurable, and meaningful DEI outcomes for Rotary.

Piloting and evaluating new products and alternative participant models so that people can join and take action with us, wherever they live.

INCREASE OUR **ABILITY TO ADAPT**



Using change management strategies throughout Rotary, from the Secretariat to the club level, to tackle operational issues and become more agile and responsive.

Learn what your club can do at rotary.org/actionplan



VISION

To be a dynamic club of engaged members serving humanity through local and global projects.

MISSION

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

VALUES

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

- Service
- Fellowship
- Diversity
- Respect
- Integrity

ELEVATOR SPEECH – ROTARY CAMBRIDGE SUNSET

Rotary Cambridge Sunset members are people of action. We make a difference in our community and the world. We are leaders committed to helping people, and our motto is "service above self". We meet for dinner on the 2nd and 4th Tuesdays to socialize, plan service projects, discuss local and international issues and hear interesting guest speakers. We contribute each year to local and international projects.

Briefly put – we are good people, doing good things for the community and the world.



SEVEN AREAS OF FOCUS – ROTARY INTERNATIONAL



As a club, Rotary Cambridge Sunset will focus on Basic Education and Literacy, Community Economic Development and Environment during the period of this strategic plan.

Ending polio forever

In addition to the seven (7) areas of focus, Rotary continues its work to eradicate polio. In September 1979, volunteers administered drops of oral polio vaccine to children at a health centre in Guadalupe Viejo, Makati, Philippines. The event in metropolitan Manila was arranged and attended by Rotarians and delegates from the Philippine Ministry of Health and over 6 million children were vaccinated.

Rotary launched PolioPlus in 1985 and was a founding member of the Global Polio Eradication Initiative in 1988. Through decades of commitment and work by Rotary and our partners, more than 2.5 billion children have received the oral polio vaccine.

After more than 40 years, our goal of eliminating this disease is very close. Today, Afghanistan and Pakistan are the only countries where polio remains endemic.

INTRODUCTION TO STRATEGIC GOALS AND OBJECTIVES

A **strategic goal** is a specific target, an end result or something that is desired. It is a major step in achieving the vision of the organization. Our Club should set several goals that outline a path to achieving the vision. To ensure that the goal is clear, we develop it using the acronym S.M.A.R.T., and ensure that the goal is: Specific, Measurable, Attainable, Relevant and Timely.

In the strategic planning context for our Club, a goal describes a future place where our Club wants to be, in other words a destination. For example, a SMART goal for our Club might be to increase our membership to 30 members by 2026.

The goal of reaching a membership of 30 active members will be an important step in achieving the vision of becoming a dynamic, respected, and high performing Rotary Club in District 7080.

A strategic objective is probably the most exciting part of our strategic plan. This is where we breathe life into our dreams and visions and translate them into concrete steps and actions. Ideally, objectives are completed within a single year.

Objectives represent a measure of change in order to bring about the achievement of the goal. The attainment of each goal may require a number of objectives to be reached (see figure above).

There is often much confusion between goals and objectives. Whereas, a goal is a description of a destination, an objective is a measure of the progress that is needed to get to the destination.

GOALS AND OBJECTIVES – ROTARY CAMBRIDGE SUNSET - 2024- 2028

Action 1 – Increase our impact		
Goals	Objectives	Responsibility
1. Identify key areas of need in our local community	1. Invite speakers related to areas of focus	Club Administration
2. All members contribute to The Rotary Foundation Annual Fund	2. Ensure 100% participation (Every Rotarian, Every Year)	Foundation Committee

Action 2 – Expand our reach		
Goals	Objectives	Responsibility
1. Attract new members to reach 30 members by 2026-27	1. Hold a Community Open House in 2025-2026	Membership Committee
	2. Membership – 2024/25 – 25	All members – reminders by Membership Committee
	3. Membership -2025/26 – 28	
	4. Membership 2026/27 – 30	
	5. Each One Bring One – each member to invite at least 1 guest per year	All Members
2. Expand our reach by promoting awareness of Rotary Cambridge Sunset through social media, our website and other information sharing platforms/social networks	1. ClubRunner website – each meeting	Public Relations /Communications Committee
	2. Social media posts – related to service projects, invitations, community linkages and RI content	Public Relations /Communications Committee

Action 3 – Enhance participant engagement

Goals	Objectives	Responsibility
1. Each member will participate in hands on service projects	1. Quarterly service opportunities will be planned 2. Mapping Volunteer Opportunities (within Rotary and Beyond)	Service Committee Anne Tinker
2. Plan a quarterly social event	1. Initiate a “Guess Who’s Coming to Dinner” event in 2024/25 2. Ensure there is a quarterly schedule of social events	Milton Wybenga Club Administration

Action 4 – Increase our ability to adapt

Goals	Objectives	Responsibility
1. To be an inclusive club and to remove barriers to access	1. To annually review the value of Rotary membership & fees	Board of Directors
	2. Review alternative membership opportunities (Friends of Rotary etc.)	Board of Directors

TRACKING SUCCESS OF GOALS AND OBJECTIVES

What gets measured gets done. This is a well-known business strategy. It applies to Strategic Plans for organizations and service clubs as well. In order for the Strategic Plan to be a living document, the Club will need to commit to a regular review of the achievement of its goals and objectives.

Sometimes goals and objectives are changed as new priorities are identified.

In order to track the success of the plan, a quarterly review is recommended. Often, organizations use a “red, yellow, green” to monitor success.

Example of a Monitoring Report (Quarter 1 Report):

Goal	Objective	Indicator	Flag (R, Y, G)
Goal # 1. To increase our membership to 40 members by 2020.	To increase our membership by 4 net members each year	1 New member	G
	To invite prospective members to at least four information sessions each year (one per quarter).	0 sessions held	R

APPENDIX 1 - STRATEGIC PLANNING PROCESS

All Rotary Cambridge Sunset members were invited to attend a strategic planning session at Goodness Me (525 Hespeler Road) on Sunday April 14, 2024 from 0900 – 1200 hours. The following individuals were able to participate in the session:

1. Anne Tinker
2. Gary Whetung
3. Greg Schmid
4. Jason Fitzpatrick
5. Milton Wybenga
6. Nathan Bullock
7. Nicole Fitzpatrick
8. Prakash Venkataraman
9. Rita Westbrook
10. Scott Hebert
11. Sue Ricketts

Preparation

The strategic planning included a review of the following resources in preparation for our discussion:

- Rotary International’s Strategic Planning Guide
- Rotary Club Health Check
- Rotary’s Action Plan
- Rotary Cambridge Sunrise – Strategic Plan

STRATEGIC PLANNING GUIDE – STRATEGIC ISSUES

- As a new club we are preparing to begin fundraising projects through charity bingo registration and reviewing fundraising opportunities that will help us support community and global programs.
- We need to leverage our social networks (external volunteer connection, corporate partnerships, Chamber of Commerce, other Rotary clubs in the Cambridge cluster and Waterloo-Wellington area as well as the district).
- We can partner with other clubs (such as our sponsor -- Rotary Club of Cambridge Preston Hespeler) to enhance our ability to contribute.
- We are working to invite any members of the Rotary Club of Cambridge North who may wish to join our club when they relinquish their club Charter in June 2024. The wisdom, experience and ideas of any members would assist our club.

- Our Club would benefit from focus. Identification with a smaller number of key commitments would be more impactful.
- Technology has changed the way individuals can connect with their community, neighbours and participate in local events. Many individuals may be willing to assist as a volunteer for a focused period (where there is a start and an end). They may be inspired by a cause or event, rather than commitment to a lifelong or multi-year participation with Rotary. We need to embrace volunteers and develop opportunities to engage them (e.g. Friend of Rotary).
- Some prospective members may not be able to join due to the costs of membership. We need to continually monitor our fees and ensure that we minimize barriers to membership.
- Some members' ability to participate changes over their years in Rotary. Depending on work and/or life events, members often have varying capacity to contribute resources (e.g. with volunteer time, financially, or both).
- Governments have increasingly filled a void once solely the domain of service clubs and community organizations, by providing funding and paid services where volunteer organizations once filled this void. We need to ensure that we focus on a smaller number of areas and gain recognition for impact in these areas.
- We are the only "Sunset" club. This should be celebrated as a competitive advantage. Our format and meeting format foster member engagement in a way that is less interruptive to regular work schedules, and also supports individuals who work outside our immediate community.

STRENGTHS

- We are a new club with new ideas and new opportunities for service.
- Diversity of membership.
- Strong awareness of different social issues and opportunities with a diverse group of leaders from health & social services, community service, small business, technology, and across several sectors.
- Welcoming and enthusiastic membership
- Availability of technology (e.g. Zoom and other remote participation platforms).
- New members are a source of strength as they can bring new ideas, new contacts and fresh approaches to our work and impact.

WEAKNESSES

- New Club – which is building our capacity to do fundraising and hands on service projects.
- We do not yet have funding to contribute to major donations.
- We are one of four (4) Cambridge clubs – competition for profile and recognition (but an opportunity for joint events and/or cross-promotion of major events).

OPPORTUNITIES

- We are the only “Sunset” club. This should be celebrated as a competitive advantage. Our format and meeting time allow our members to engage in a way that is less interruptive to regular work schedules, and also supports individuals who work outside our immediate community.
- We have a supportive community in Cambridge and Waterloo Region.
- The Rotary clubs work together in the Cambridge cluster.
- Rotary Club of Cambridge North will be returning its Charter in June 2024 after 50 years of history in our community. Some of their members may join our club.
- Visibility of Rotary and Rotary Cambridge Sunset would help with brand recognition and our value proposition to new members. Where is our lasting impact? As founders of The Rotary Children’s Centre (now renamed KidsAbility), we have lost some of our recognition in the community.
- Rotary Cambridge Sunset could ensure that our logo is used in promotion and social media posts by all recipients of any funds.
- The Club also has an opportunity to recruit Corporate Members.
- Opportunity to explore partnerships with Salvation Army, Lang’s, YMCA, United Way of Waterloo Region Communities, and the local Chamber of Commerce.
- Continue to connect with former Rotarians and Rotary alumni (maintain a list for annual reconnect week celebrations).

CHALLENGES

- Member Retention.
- Member Attraction.
- Newer club and we’re finding our footing.
- Challenge is to maximize our impact with focus on a small number of issues.
- Identify “signature project” for our club that will set us apart from other Rotary clubs.

CLUB EXPERIENCE CHECKLIST (ROTARY CLUB HEALTH CHECK)

Members who have a positive Rotary experience are more likely to stay. In turn, they create a positive Rotary experience for others, because their enthusiasm is contagious. If your club’s members genuinely enjoy being a part of the club, then we’re on the right path. Your experience includes not just your club meetings and other activities, but also the connections you’ve made and your pride in Rotary’s work.

The club completed the Rotary Club Health Check with a representative group of six (6) board members, and the results were as follows:

RATING SCALE: ✓ = Positive ● = Neutral ✗ = Negative

Rating	Dimension of Experience
✓	I look forward to attending club meetings.
✓	Our club meeting programs are relevant, interesting, and varied.
✓	We have a greeter or greeters who welcome members and visitors to meetings.
✓	Our meetings are organized and run professionally.
✓	Members make an effort to meet and talk with different people at each meeting.
✓	I've made several new friends in the club.
✓	Our club tries new things (activities, meeting practices and formats, service, socials, etc.) to enrich members' experience.
✓	We are inclusive in who we invite to our club, how we welcome guests, the topics we discuss, and the service we focus on.
●	Members other than club leaders participate in Rotary events at the district or international level.
●	Most members are aware of Rotary's Avenues of Service and areas of focus, take part in projects, and feel proud to be a part of the club.
●	We raise funds in a way that allows members to contribute what they wish.
✓	We recognize members' service, engagement, and donations by nominating them for and presenting them with awards.
●	I have made international connections through Rotary.
✓	Guests are asked to introduce themselves and are invited back.
✓	We provide members with flexible meeting opportunities (attending virtually or in person or watching recordings if they miss a meeting).

SHARING PLAN WITH PARTICIPANTS

All attendees will be sent a draft of the document for review/any corrections.

DISSEMINATION TO ALL ROTARY CAMBRIDGE SUNSET MEMBERS

The final draft will be shared with the entire club and will be posted on the Members Only section of our ClubRunner site.

For more information visit our Club website:

www.rotarycambridgesunset.ca

of follow us on our Facebook and Instagram accounts



For information about Rotary International

www.rotary.org

For information about Rotary District 7080

www.rotary7080.org