

CHEAT SHEET: ON SITE VISIONING

EXAMPLE OF ASSIGNMENTS FOR THE EVENT:

Opening remarks – Lead
PowerPoint Presentation – Presenter
Extraction – Extractor (extracts the ideas from the participants)
Scribing – Scribe (records the ideas on flipcharts)
Voting Exercise – Presenter (organizes two rounds of voting)
Summarizing/Synthesizing – Scribe leads, assisted by team
Vision to Success – Planner (explains: Master Plan, Action Plan, Action Plan Practice, Assignments)
Closing Remarks – Lead
Evaluation - Lead

**Bring Camera,
 Laptop, Projector
 Extra Writing
 Exercises, Action
 Plans, Handouts and
 Extra Sunnlies**

The Event – Timeline

(Times are approximate and will change depending on number of participants)

- 4:30 – 5:00 Arrival of facilitation team and set-up
- 5:00 – 5:15 Start Buffet line or box supper and be seated for meal
- 5:15 – 5:20 Club President welcome all to event
- 5:20 – 5:30 Present the PowerPoint (**while everyone is eating**)
Includes Intro Facilitation Team and Rules of the Room
- 5:30 – 5:40 Introduction of Rotary club members: **Name, number of years in Rotary (in this club or others), and club leadership role**
 Introduce Vision Exercise reminding of future looking back
- 5:40 – 5:50 Clean-up meal mess/bathroom break
- 5:50 – 7:30 Extraction and Scribing of as many sheets as are needed
- 7:30 – 7:35 Break - (**cross out redundant statements, MOVE elements that are in the “wrong” category if needed**)
- 7:35 – 8:00 **Round 1** - Blue Dot prioritization on each of the 7 Categories:
- | | | |
|----------------------------|--|------------------|
| ABILITY TO ADAPT: | Vision Pursued/Relevance | (4 Votes) |
| EXPAND REACH: | Size | (1 Vote) |
| | Attributes/Public Image | (4 Votes) |
| ENHANCE ENGAGEMENT: | Engaging Members/Leadership Development | (5 Votes) |
| INCREASE IMPACT: | Community Service/International Service | (6 Votes) |
| | Fundraisers | (2 Votes) |
| | Foundations | (2 Votes) |
- Round 2** - Red Dot prioritization on each of the Categories. Use same number of votes as above but delete Size. Also Increase our Impact may only need 4 instead of 6 votes. Breakdown of Categories by dot totals...to obtain the top 3-4 ideas in each Category.
- 8:00 – 8:10 Summarize/Synthesize verbally to group the 3-4 ideas in each Category
- 8:10 – 8:40 Vision to Success: explain Master Plan and Action Plan. Practice Action Plan by dividing the participants into groups of 3 and giving them 15 minutes to design an Action Plan.
- 8:40 – 9:00 Vision to Success: Assignments. Planner asks for volunteers while Scribes capture on newsprint the names and dates for each of the six assignments.
 Closing questions/remarks and discuss observations to the extent that the group wishes
 Evaluation/Survey

ACTION	WHO	WHEN (Specific Date)
Gather the list of ideas charts	John, our club secretary or volunteer	ASAP up to 1 week using the facilitation team provided Excel template
Create a statement of purpose, vision statement, motto, or “elevator speech” for club	Mike, Jenny and Sue (3 or more mixed gender with one as chair)	3 weeks (in preparation for our Club Assembly)
Establish process and develop the Master Plan	President, PE, 1 or 2 others who participated in event	2-3 weeks to have Master Plan done
Share Visioning results with club	President Steve with others from event	Upcoming Quarterly Club Assembly or Forum in 5-6 weeks...PowerPoint template will be sent for you to fill in your results to present
Chose a Club Impact Leader or Team	Well respected enthusiastic & experienced Rotarians	Leads the ongoing implementation
Create an Action Plan for each idea in the Master Plan	To be assigned to committee chairs and others	Action Plans returned to President by ? (suggest 4-6 weeks if they don’t answer)

CHEAT SHEET – ADDENDUM 1

Welcome, Opening the session & Mealtime: Facilitator: Rules of the Room- Cell phones off, Bathroom locations, Respect each other's views, One person speaks at a time, NO wrong answers or input.

PowerPoint Presentation: Presenter: See notes section of PowerPoint

Ice Breaker: Identify the Rotary-related experience level of all participants gathered for the facilitation. Consider saying: "We would like to know how long each of you has been involved in Rotary. Tell us if it's a month or years. Tell us, too, if you've been a member of the Rotary Family in other parts of the country or, for that matter, the world. So, then, please state your name, role in the club, and how long you have been in Rotary.

As a form of "ice-breaker," go around the room, asking each participant to state: name, role in the club, and number of years in Rotary. (Even members of the same club may not know the longevity of their fellow Rotarians.)

Introduce the Written Exercise: Facilitator: During the PowerPoint presentation, four key concepts were offered. What were these terms? Hint--they all began with the letter "C."

[Draw out from the group the terms...Continuity/Consistency/Consensus/Communication. Review the importance of each with your own supporting examples or anecdotes as to the value of this planning Triangle. On the flip chart, draw a large equilateral triangle. Label the diagonal lines as Continuity and Consistency. The term – Consensus – should be deliberately placed at the BASE of the triangle. Communication goes in the middle of the triangle because it is a critical component. It becomes visually obvious as to why this is a group effort and that everyone needs to be highly participative during the course of the event.

Facilitator: In a moment, you'll be asked to imagine the future – to place yourself **3 years from today** and look back on the success of your Rotary Club. You'll be asked to "see" your club not as it is, but as it has become.

[Suggest that Facilitator incorporate any of the following quotes into the value of looking beyond today. Consider...

- *Dreams get you into the future and add excitement to the present. (Robert Conklin)*
 - *Your hopes, dreams, and aspirations are legitimate. They are trying to take you airborne, above the clouds--above the storms--if you only let them. (Henry James)*
 - *Vision is the art of seeing things invisible. (Jonathan Swift)*
 - *If you reach for the stars, you may not grasp one. But you'll not come up with a handful of mud either. (Anon.)*
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DOT VOTING EXERCISE: 24/26 dots on your sheet – start at a chart (not all people at same chart) – *move clockwise* – *no stacking of dots* on your favorite idea. Prep sheets for second round by putting an X over any ideas that will be eliminated in the dot voting box to limit the choices on the second round to 5-7.

Closing Comments: It was a real pleasure to work with each of you during this event.... This (name) Rotary Club team has accomplished a tremendous amount in your session.

- In about 4 hours you brainstormed and reached consensus on a set of priorities for near and long term action based on the Rotary Action Plan priorities plus Fundraising and Foundation
- It can, and should be,
- a platform for communicating with the whole club about the work you have done here,
- what it means as a platform for short and long term plans for your club
- and a way to help ensure continuity and consistency of focus and action into the future

As we close this session, let me ask you two questions:

- What doubts, worries, concerns, or reservations do you have about the discussion of your ideas and upcoming actions? [Listen to responses]
- What excites or energizes you most about what you have accomplished in this session?" (Listen and affirm)
- Thank the participants for their attendance and participation. Recognize that they have given their time and energy to create a focus for the future of their club, and in doing so have an impact on the future of their community.

