

**EXAMPLE OF ASSIGNMENTS FOR THE EVENT:**

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

**Take screenshots of group.  
One person watches chat room.  
Assist watching for raised hands.**

**The Event – Timeline**

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

**SESSION ONE**

- 30 min Arrival of facilitation team for sound/video check, last minute details
- 5 min Technical overview – Rules of the Zoom demo with practice and questions
- 2 min Introduction of Facilitation Team (**Name, Club, Rotary experience**)
- 2 min Ask Club President (or club convenor) to Welcome everyone to the event
- 15 min Present the PowerPoint (includes a slide for introduction of Rotary club members: **Name, number of years in Rotary (in this club or others), and club leadership role**)
- 5 min Introduce Vision Exercise reminding of future looking back
- 45-60 min Extraction and Scribing into Survey Monkey via screen share
- 2-3 min (**cross out redundant statements, MOVE elements that are in the “wrong” category if needed, scribe will organize for voting**)
- 10 min Round 1 – Voting done via SurveyMonkey link
- 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)**
- 10 min Round 2 - Voting done via SurveyMonkey link. **Voting can be done between sessions** via e-mail with clear instructions. Use same number of votes as above, but delete Size. Also, Increase our Impact may only need 4 instead of 6 votes.

**SESSION TWO**

- 5 min Technical overview – short reminder of Rules of the Zoom
- 10 min Summarize/Synthesize verbally to group the 3-4 ideas in each Category. Show results of Round 2 Voting on a slide or screen share the SurveyMonkey results
- 30 min Vision to Success: explain Master Plan and Action Plan. Practice Action Plan by sending participants to breakout rooms for 15 minutes with about 4-5 in each to design an Action Plan.
- 10 min Vision to Success: Assignments. Planner asks for volunteers while Scribe screen shares MSWord template to capture the names and dates for each of the six assignments.
- 10 min Closing questions/remarks and discuss observations to the extent that the group wishes
- 5 min Evaluation/Survey

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

# CHEAT SHEET – ADDENDUM 1

**Welcome, Opening the session:** Facilitator: Rules of the Zoom demo with practice and questions.

**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," call on each participant by first name to unmute and state: full 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 white board, 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)*
- .....

**VOTING EXERCISE:** Participants will vote via Survey Monkey in two rounds. There is no stacking of votes on your favorite idea in each Category as the form will not allow it. Prep sheets for second round of voting by creating another SurveyMonkey link which has narrowed the choices to 5-7 ideas. Survey link is put in chat or sent during the day between the two sessions.

**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 during the two sessions.

- 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.

