CLUB VISIONING TRAINING GUIDE

Table of Contents

Training recommendations

Our training resources are meticulously planned by our IVFC team and are designed in a manner geared toward the maximization of efficiency. Your time is valuable, so our goal is to best prepare you while taking up the least amount of your time possible.

Your training materials are a combination of resources from our Club Visioning Guide as well as Video excerpts from Virtual training and recordings of actual Club Visioning Facilitations. The links below will be utilized during this self-paced learning guide. Your District Visioning Chair will provide all copyrighted materials to you for reference as downloaded from the client portal of rivisionfacilitation.org because your District maintains current enrollment status within IVFC. Each role will require an investment of time to prepare to deliver a Club Visioning. We suggest you follow the materials in the order presented.

- Rivisionfacilitation.org
- IVFC YouTube Channel
- Club Visioning Guide

Additional Facilitation resources and information about Rotary's Action Plan can be found in the Learning Center at MyRotary.

1. **Introduction of the Process**

Please review pages 4-6 of the [Club Visioning Guide](#) and the following documents as provided by your District Visioning Chair downloaded from the client portal of [rivisionfacilitation.org](#) that are utilized throughout the process:

Pre-Event:
[Club Profile](#)
[Rotary Vision Questionnaire](#) (RVQ)
[Writing Exercise](#)
[Rotary Vision Statement](#)
[Club Models](#)
[The Rotary Foundation Levels of Giving](#)

At-Event: (on Site)	**At-Event: (Virtual)**
[Writing Exercise](#)	[Writing Exercise](#)
[Club Visioning Event PowerPoint](#)	[Club Visioning Event PowerPoint](#)
[Master Plan](#)	[Vision to Success Template](#)
[Action Plan](#)	[Extraction Template](#)
[Cheat Sheet (on site)](#)	[Master Plan](#)
	[Action Plan](#)
	[Cheat Sheet (virtual)](#)

Post-Event:
[Club Visioning Results Template](#)
[Vision to Success Guide](#)
[Master Plan Template](#)
[Action Plan Template](#)

Then view [VISIONING INFORMATIONAL MEETING](#) for an overview of the Club Visioning Process.

2. Facilitation Team Roles

Please review pages 7-9 of the [Club Visioning Guide](#) for a description of the roles. Then view [ROLES OF THE TEAM](#) for an overview of each role. After you have reviewed the video of the roles, you will have the opportunity to learn how to facilitate each specific role both on site and on the virtual venue.

3. Lead

The Lead coordinates with the club, that is asked to appoint a Club Visioning Coordinator, after the club requests a Club Visioning Event and follows the timeline for Before, During, and After the event. This role is best done by an experienced facilitator in Club Visioning who has demonstrated proficiency in the other roles. This individual will be responsible for providing materials to and coordinating with the Club Visioning Coordinator before, during, and after the event. Additionally, the Lead organizes and communicates with the Facilitation Team. Please review the Club Visioning Guide throughout, particularly pages 11, 46-48, and view [OVERVIEW AND TEAM LEAD](#).

4. Presenter

The Presenter will be primarily responsible for setting the stage for the Club Visioning by creating a welcoming environment and delivering the PowerPoint presentation provided by the District Visioning Chair as downloaded from the client portal of [rivisionfacilitation.org](#). Please review the Club Visioning Guide page 17-19 and then view [PRESENTER TRAINING](#) for a better understanding of this role.

5. Extractor

The Extractor solicits club members' vision ideas from their Writing Exercise by calling on participants who raise their hands and then works with the participants to "soundbite " their responses for the Scribes to capture either on the flip chart newsprint or on the SurveyMonkey. The Extractor ensures full club member participation by noticing and calling on members who are not participating. Please review the Club Visioning Guide pages 20-24 and then view [EXTRACTOR TRAINING](#) for a better understanding of this role.

4

6. Scribe

Whether on site or virtual, the Scribe is responsible for capturing the ideas shared by the participants that have been evoked by the Extractor from their Writing Exercise. Communication is key and, in a virtual environment, technical skills are required. Please review the Club Visioning Guide pages 24-29 and then view SCRIBE TRAINING for a better understanding of this role.

a. Voting

Please review Club Visioning Guide pages 30-32 for on site and virtual

b. Summary/Synthesis

Please review the Club Visioning Guide pages 33-36 for on site and virtual

7. Planner

The Planner serves in a critical role to help the club members take their extracted ideas, after prioritizing, and turn the ideas into goals on a Master Plan. The Planner shows the club members that once changed to goals, Action Plans must be developed. Then the Planner asks members to volunteer for assignments to begin the process of implementing their ideas. The Planner will be responsible for the 15 minute small group practice on site or the Zoom breakout activity if virtual. Having them share their practice in developing an Action Plan is facilitated by the Planner. This individual should be experienced in the Club Visioning Process and comfortable teaching the Vision to Success portion of the facilitation. Please review the Club Visioning Guide pages 37-43 and then view PLANNER TRAINING for a better understanding of this vital role for implementation of the Club Vision.

8. Tech Host

The Tech Host role is utilized if the Club Visioning Event is held virtually or in a hybrid format. The Tech Host role is responsible for ensuring all the technology programs and the Zoom platform are set up and technology instructions are specific so club members can optimally utilize the technology. Please review the Club Visioning Guide pages

5

specifying Virtual delivery and then view TECH HOST TRAINING for a better understanding of this role that is only utilized in a virtual delivery.

Putting it all Together

After familiarizing yourself with the roles and with the Facilitation Tips for both on site and virtual (pages 49-54), we recommend you participate in a Club Visioning as soon as possible or be an observer at one. If you will be facilitating in a Virtual Delivery, we recommend you watch an entire virtual Club Visioning that is broken into SESSION ONE (5 videos) and SESSION TWO (6 videos).

This "guide" is to help you navigate between the inclusive Club Visioning Guide and the YouTube training videos from our web based training sessions. Additional interactive learning materials will be available on our website in the future. Your District Visioning Chair in partnership with your Zone Visioning Chair will be here to assist you with additional learning and resources needs. For more resources please go to rivisionfacilitation.org or to your District Visioning Chair for the copyrighted downloadable materials to be provided to you.

Thank you for your commitment to Club Visioning to help Rotary Clubs see themselves "not as they are, but as they can become."

6