

# Club Visioning

## Virtual Delivery Model



## Technical Guide

# Contents

INTRODUCTION .....3

    Overview..... 3

    Steps in the Virtual Delivery process ..... 3

        1. Presentation to club about Club Visioning ..... 4

        2. Coordination between District Visioning Chair and club ..... 4

        3. Set up of Zoom Platform by Tech Host..... 5

**Zoom Configuration Guide for Virtual Delivery.....5**

Registration Setup: .....8

    Email Settings ..... 9

    Branding.....10

    Poll .....10

**Zoom References ..... 12**

**The Visioning Process has 10 steps ..... 13**

    Distribution of Rotary Visioning Questionnaire (RVQ) .....13

        4. Distribution of Visioning Exercise .....15

        5. Club Visioning Session 1 .....15

        6. Extraction into Survey Monkey.....16

        7. Voting: Round 1.....19

        8. Voting: Round 2 .....19

        9. Club Visioning Session 2 .....19

        10. Summary/Synthesis .....19

        11. Vision to Success: Master Plan/Action Plan ..... 20

        12. Breakout: Creating Action Plans ..... 20

        13. Vision to Success Assignments ..... 20

**14. Closing Remarks & Evaluation ..... 20**

# INTRODUCTION

## Overview

### Statement of Purpose

This process is an alternative delivery method of the Club Visioning Program. The purpose of this document is to provide a detailed guide for the technological requirements, necessary team roles, and the actual step by step delivery of Club Visioning in a Virtual delivery model.

These techniques have been tested and are the recommended best practice based on our piloted club delivery in multiple clubs and districts. Alternate methods, if used, may not have the same results.

This technical guide will focus on key components of the Virtual delivery and where they fit in the process.

## Steps in the Virtual Delivery process

1. Presentation to club about Club Visioning
2. Coordination between District Visioning Chair and Club Visioning Coordinator to schedule the event
  - a. Optional technical practice with club
3. Set up of Zoom platform by Tech Host team member
  - a. Assignment of team roles
  - b. Technical Rehearsal
4. Distribution of Electronic Rotary Visioning Questionnaire (RVQ) to entire club
5. Distribution of Electronic Visioning Exercise document
6. Club Visioning Session 1
  - a. Overview of Club Visioning
  - b. Extraction from the Writing Exercise
  - c. Round 1 Voting immediately after Session 1
  - d. Round 2 Voting before Session 2
7. Club Visioning Session 2
  - a. Summary/Synthesis of consolidated ideas

- b. Explanation of Master Plan
  - c. Explanation of Action Plan
  - d. Action Plan breakout
  - e. Vision to Success Assignments
8. Post Visioning Documents
- a. PowerPoint template to share results with the club
  - b. Master Plan template
  - c. Action Plan template
  - d. Vision to Success Guide
9. Follow up by District Visioning Facilitation Lead as needed

## **1. Presentation to the club about Club Visioning**

To be done by District Visioning Chair or designee utilizing the IVFC PowerPoint and materials to demonstrate the value and benefits to the club. This step is optional if the club requests outright.

## **2. Coordination between District Visioning Chair and the club**

As the club invites the District Visioning Chair to schedule a Club Visioning, a choice of delivery methods is made; On Site or Virtual.

Requirements for Virtual Delivery:

- All club members will need to login to a separate computer or tablet with internet access
- Prefer all members have access to a camera and microphone on their preferred device for visual interaction
- Club Visioning Coordinator confirms the members are technically able to log into a Zoom meeting from their locations and provides a practice session or confirms the club has experience in virtual meetings
- A commitment of attendance at both Club Visioning sessions ( two (2hr) sessions) should be made by the members
- Sessions to be scheduled from 2 days, to no more than 1 week apart, preferably during the same exact hour time frame
- Commitment of club to have no more than 25 in attendance to include club current and incoming leadership, new members, and tenured members among the participants.

### 3. Set up of Zoom Platform by Tech Host

**See Technical Resource guide for instructions and role requirements\***

The Tech Host is a member of the District Visioning Facilitation Team with proven experience of serving as a Tech Host of Zoom meetings to include

- Registration set up on Zoom platform with link shared with the Club Visioning Coordinator
- Set up of breakout rooms
- Set up of Polls
- Ideally 2 monitors

Lead is chosen by the District Visioning Chair. Lead assigns roles to the District Visioning Facilitation Team members and a tech rehearsal is scheduled

- Tech Host
- Presenter
- Scribe
- Extractor
- Planner

## ZOOM CONFIGURATION GUIDE FOR VIRTUAL DELIVERY

The configuration of the Zoom platform will be done by the Tech Host. The District should maintain a subscription to Zoom. This can be purchased at [www.zoom.us](http://www.zoom.us) and the Pro version is recommended. A 20% discount is available if purchased using the Rotary Discount Code **ZOOMROTARY** Participants will need to “Download Zoom Client” on their computer, laptop, tablet, or smartphone.

After dates for two sessions have been arranged, the Tech Host will set up a recurring meeting in the Zoom account using a pre-saved template. Registration is to be set as **required** to support the breakout rooms, as well as a passcode, to provide a level of security. The time of day will need to be the same for recurring setup. Activate “**Breakout Room pre-assign.**” Then click “**SAVE.**”

SOLUTIONS
PLANS & PRICING
CONTACT SALES

PERSONAL
Profile
Meetings
Webinars
Recordings
Settings

ADMIN
> User Management
> Room Management
> Account Management
> Advanced

Attend Live Training
Video Tutorials
Knowledge Base

My Meetings > Edit "Greenwood White River Visioning"

Topic

Greenwood White River Visioning

Description (Optional)

We are excited you will be joining us to explore opportunities to strengthen your Rotary Club. This is a 2 part session and participation in both sessions fully is important to ensure your input is included. We look forward to "seeing" you soon. Please use a computer or laptop if possible for optimal

When

09/28/2020 5:00 PM

Duration

2 hr 0 min

Time Zone

(GMT-5:00) Central Time (US and Canada)

☒ Recurring meeting Every day, until Sep 29, 2020, 2 occurrence(s)

Recurrence

Daily

Repeat every

1 day

End date

By 09/29/2020 7 occurrences

Registration

☒ Required
Attendees register once and can attend any of the occurrences
Attendees need to register for each occurrence to attend
Attendees register once and can choose one or more occurrences to attend

Security

☒ Passcode Vision
☒ Waiting Room

Video

Host

on off

Participant

on off

Audio

☐ Telephone
☐ Computer Audio
☒ Both

Dial from United States of America Edit

Meeting Options

☐ Enable join before host
☒ Mute participants upon entry
☐ Only authenticated users can join
☐ Only authenticated users can join
☒ Breakout Room pre-assign
+ Create Rooms
Import from CSV
☐ Automatically record meeting on the local computer

Alternative Hosts

Example: many@company.com, peter@school.edu

Save

Cancel

Once the meeting is set up, then on the meeting screen, you will see an option to **“Copy Invitation”** on the far right. That is the link that is sent to the District Visioning Facilitation Team and the Club Visioning Coordinator for registration. This link should be set up as soon as the meeting times are confirmed. The Lead sends this link to the Club Visioning Coordinator with the instructions to only send the registration link to those club members who will be participating in the Club Visioning Event.

The screenshot displays the Zoom web interface for managing a meeting titled "Greenwood White River Visioning". The left sidebar contains navigation links for Personal (Profile, Meetings, Webinars, Recordings, Settings) and Admin (User Management, Room Management, Account Management, Advanced). The main content area shows meeting details: Topic, Description, Time (Sep 28, 2020 05:00 PM Central Time (US and Canada)), Meeting ID (861 1629 8781), Security (Passcode, Waiting Room), Registration Link, Video settings, Audio settings, and Meeting Options. A blue arrow points to the "Copy Invitation" link. The bottom section shows tabs for Registration, Email Settings, Branding, Poll, and Live Streaming. The "Registration" tab is active, showing "Manage Attendees", "Registration Options", and "Registrants: 3".

The Bottom portion of the meeting page is where you will configure your registration setups, email templates, branding, and Polls.

This block provides a detailed view of the registration settings in the Zoom interface. At the top, there are links for "Delete this Meeting" and "Save as a Meeting Template". Below these are tabs for "Registration", "Email Settings", "Branding", "Poll", and "Live Streaming". The "Registration" tab is currently selected. Under this tab, there are sections for "Manage Attendees", "Registration Options", and "Registrants: 3". The "Registration Options" section includes several checkboxes: "Automatically Approved", "Send an email to host", "Close registration after meeting date", "Allow attendees to join from multiple devices", and "Show social share buttons on registration page".

## Registration Setup:

At the Registration set up choose “**edit**” at the far right. Set up to automatically “**Approve**” and send an email to Tech Host when someone registers and allow attendees to join from multiple devices

Click “**Questions**” at the top and Select Last name

The left screenshot shows the 'Registration' tab with the following settings:

- Approval:**
  - ☒ **Automatically Approve**  
Registrants will automatically receive information on how to join the meeting.
  - ☐ **Manually Approve**  
The organizer must approve registrants before they receive information on how to join the meeting.
- Notification:**
  - ☒ **Send an email to host when someone registers**
- Other options:**
  - ☐ Close registration after event date
  - ☒ **Allow attendees to join from multiple devices**
  - ☐ Show social share buttons on registration page

The right screenshot shows the 'Questions' tab with the following fields:

Field	Required
First Name and Email Address required.	
<input checked="" type="checkbox"/> Last Name	<input checked="" type="checkbox"/>
<input type="checkbox"/> Address	<input type="checkbox"/>
<input type="checkbox"/> City	<input type="checkbox"/>
<input type="checkbox"/> Country/Region	<input type="checkbox"/>
<input type="checkbox"/> Zip/Postal Code	<input type="checkbox"/>
<input type="checkbox"/> State/Province	<input type="checkbox"/>
<input type="checkbox"/> Phone	<input type="checkbox"/>
<input type="checkbox"/> Industry	<input type="checkbox"/>
<input type="checkbox"/> Organization	<input type="checkbox"/>
<input type="checkbox"/> Job Title	<input type="checkbox"/>

Click Choose “**Custom Questions**” at top and add “Current Role in Club”

The 'Custom Questions' tab shows the following table:

Order	Your Questions	Required	
1	Current role in Club	<input checked="" type="checkbox"/>	Delete

Buttons: New Question, Save All, Cancel

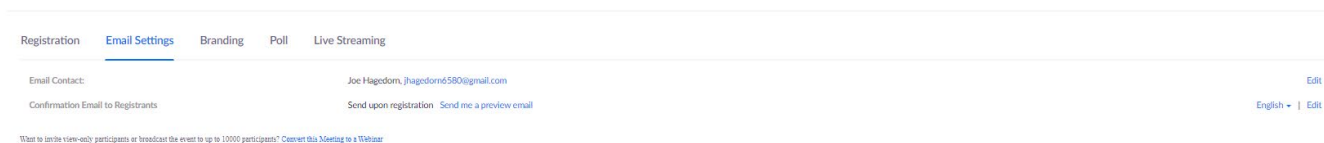
Choose “**Save All**”



## Email Settings

Choose **Email settings** and choose “**edit**” at the far right.

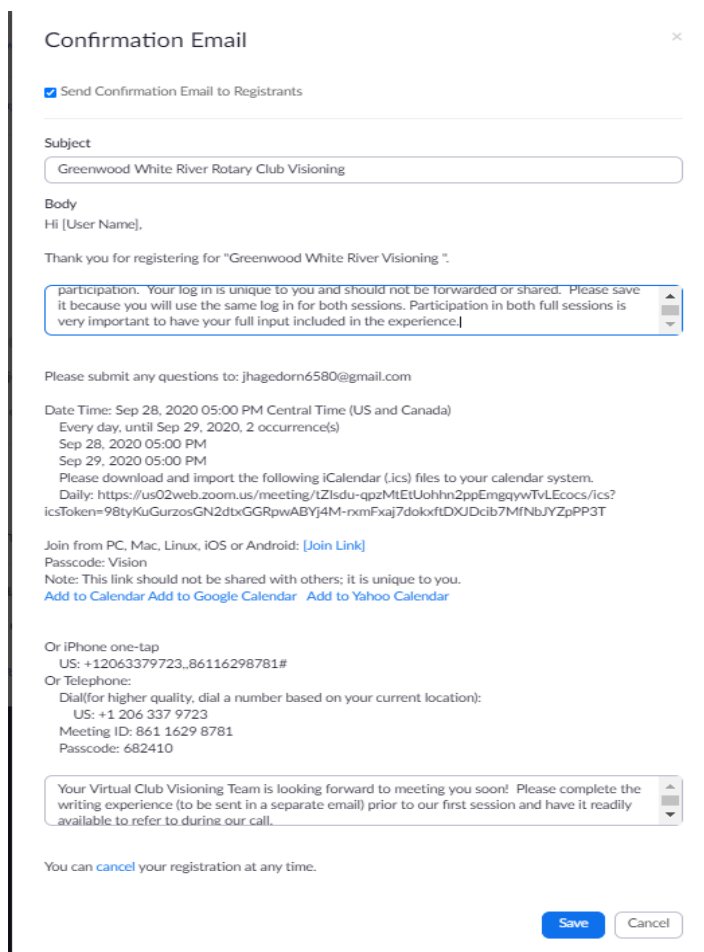
Indicate who the name and email address will be for contact information. Choose “**SAVE**”



The screenshot shows a navigation bar with tabs: Registration, Email Settings (active), Branding, Poll, and Live Streaming. Below the tabs, there are two rows of settings. The first row is labeled 'Email Contact:' and shows 'Joe Hagedorn, jhagedorn6580@gmail.com' with an 'Edit' link. The second row is labeled 'Confirmation Email to Registrants' and shows 'Send upon registration' and 'Send me a preview email' with an 'Edit' link. At the bottom, there is a note: 'Want to invite view-only participants or broadcast the event to up to 10000 participants? Convert this Meeting to a Webinar'.

Choose **Send Confirmation email to Registrants** and choose “**edit**” at the far right.

Check Send Confirmation email to Registrants and customize the available fields as desired. Choose “**SAVE**”



The screenshot shows a 'Confirmation Email' modal. It has a checkbox 'Send Confirmation Email to Registrants' which is checked. Below this is a 'Subject' field with the text 'Greenwood White River Rotary Club Visioning'. The 'Body' field contains the following text: 'Hi [User Name],  
Thank you for registering for "Greenwood White River Visioning".  
participation. Your log in is unique to you and should not be forwarded or shared. Please save it because you will use the same log in for both sessions. Participation in both full sessions is very important to have your full input included in the experience.'  
Please submit any questions to: jhagedorn6580@gmail.com  
Date Time: Sep 28, 2020 05:00 PM Central Time (US and Canada)  
Every day, until Sep 29, 2020, 2 occurrence(s)  
Sep 28, 2020 05:00 PM  
Sep 29, 2020 05:00 PM  
Please download and import the following iCalendar (.ics) files to your calendar system.  
Daily: https://us02web.zoom.us/joining/tZIsdu-qpzMteUohhn2ppEmgqywTVLEccs/ics?  
icsToken=98tyKuGurzosGN2dtbGGRpwABYf4M-rxmFxaj7dokoxtDXJDCib7MfNbJYZpPP3T  
Join from PC, Mac, Linux, iOS or Android: [Join Link]  
Passcode: Vision  
Note: This link should not be shared with others; it is unique to you.  
Add to Calendar Add to Google Calendar Add to Yahoo Calendar  
Or iPhone one-tap  
US: +12063379723,86116298781#  
Or Telephone:  
Dial(for higher quality, dial a number based on your current location):  
US: +1 206 337 9723  
Meeting ID: 861 1629 8781  
Passcode: 682410  
Your Virtual Club Visioning Team is looking forward to meeting you soon! Please complete the writing experience (to be sent in a separate email) prior to our first session and have it readily available to refer to during our call.  
You can cancel your registration at any time.  
At the bottom are 'Save' and 'Cancel' buttons.

## Branding

Registration Email Settings **Branding** Poll Live Streaming

### Banner

Your banner is displayed at the top of your invitation page.



"Organized, dedicated and trained Rotarians guiding a Rotary club to better envision its future."

Change

Delete

Edit Description

Choose **"CHANGE"** to upload the desired banner image. Available for download from IVFC

## Poll

**There are 2 polls that will need to be configured for each group of scheduled sessions. You will need to choose **"Add"** on the far right and create each one.**

Registration	Email Settings	Branding	<b>Poll</b>	Live Streaming
You have created 2 polls for this meeting.				<a href="#">Add</a>
Title	Total Questions	Anonymous		
~ Poll 1: Writing Experience	1 question	No	<a href="#">Edit</a>	<a href="#">Delete</a>
~ Poll 2: Survey	4 questions	No	<a href="#">Edit</a>	<a href="#">Delete</a>

Want to invite view-only participants or broadcast the event to up to 10,000 participants? [Convert this Meeting to a Webinar](#)

**Poll 1 is used prior to extraction to re-enforce the concept of thinking 3 years into the future. It only has 1 question**

Writing Experience

☐ Anonymous? ⓘ

1.

As I completed the writing experience, I thought this about our club in 3 years

☐ Single Choice ☒ Multiple Choice

Our club is doing amazing things and will continue for 3 yr:

Our club is doing well and has room to improve in 3 yrs

Our club has lots of room for improvement in 3 yrs

Answer A (Optional)

**Poll 2 is used at the conclusion of session 2 as a Survey of the experience and has 4 questions.**

- I found the Club Visioning Experience to be beneficial in seeing where our club can Be in 3 years and we have the tools to make it happen

☐ Single Choice ☒ Multiple Choice

Absolutely

Somewhat

Not really helpful

Answer 4 (Optional)

Answer 5 (Optional)

Answer 6 (Optional)

Answer 7 (Optional)

Answer 8 (Optional)

Answer 9 (Optional)

Answer 10 (Optional)

Delete
- I found the Virtual Visioning Experience to be//// [Edit](#) [Delete](#)
- I found the technology [Edit](#) [Delete](#)
- I found the Visioning Facilitators to be..... [Edit](#) [Delete](#)

- I found the Club Visioning Experience to be benefi... [Edit](#)
- I found the Virtual Visioning Experience to be//// [Edit](#) [Delete](#)
- I found the technology [Edit](#) [Delete](#)
- I found the Visioning Facilitators to be..... [Edit](#) [Delete](#)

210

☐ Single Choice ☒ Multiple Choice

Very engaging

Somewhat engaging

Difficult to engage with

Answer 4 (Optional)

Answer 5 (Optional)

- I found the Club Visioning Experience to be benefi... [Edit](#)
- I found the Virtual Visioning Experience to be//// [Edit](#) [Delete](#)

205

☐ Single Choice ☒ Multiple Choice

Preferred over an onsite session

As effective as an onsite session

Less effective than an onsite session

Answer 4 (Optional)
- I found the technology [Edit](#) [Delete](#)

233

☐ Single Choice ☒ Multiple Choice

helpful

neutral

difficult to navigate

Answer 4 (Optional)

**After both polls are set up then  
“Save as a Meeting Template” just above the Poll  
option**

## Zoom References

**Congratulations! You have now set up your Virtual Visioning Session on Zoom**  
**Here are some additional Zoom training resources you may find valuable**

Additional zoom training videos can be found at <https://support.zoom.us/hc/en-us/articles/206618765-Zoom-Video-Tutorials>

You may want to consider sending some of these to your clubs and team leads if they are unfamiliar

How do I join a meeting? <https://support.zoom.us/hc/en-us/articles/201362193-How-Do-I-Join-A-Meeting->

How do I Schedule a Meeting on Zoom Website? <https://support.zoom.us/hc/en-us/articles/201362413-How-Do-I-Schedule-Meetings->

How do I set up breakout rooms: <https://support.zoom.us/hc/en-us/articles/206476093-Getting-Started-with-Video-Breakout-Rooms>

How do I use Zoom Meeting Controls? <https://support.zoom.us/hc/en-us/articles/201362603-What-Are-the-Host-Controls->

Can I record a Zoom Meeting? <https://support.zoom.us/hc/en-us/sections/200208179-Recording>

How do my attendees test their device for audio/video? <https://support.zoom.us/hc/en-us/articles/201362283-How-Do-I-Join-or-Test-My-Computer-Audio->

How do I share a screen? <https://support.zoom.us/hc/en-us/articles/201362153-How-Do-I-Share-My-Screen->

How do I set up my account to have all of the features? <https://support.zoom.us/hc/en-us/articles/115005731743-Account-profile>

How do I customize my profile? <https://support.zoom.us/hc/en-us/articles/201363203-Customizing-your-profile>

## **The Visioning Process**

1. Status Assessment (Club Profile and Rotary Vision Questionnaire)
2. Introductions & Rules of the Room
3. PowerPoint Presentation
4. Writing Exercise
5. Extraction
6. Round 1 Voting
7. Round 2 Voting
8. Summary/Synthesis
9. Master Plan
10. Action Plan/Action Plan Practice
11. Vision To Success Assignments
12. Closing Remarks and Evaluation

### **Distribution of Rotary Visioning Questionnaire (RVQ)**

**SurveyMonkey offers a powerful tool for online distribution utilizing a Template from IFVC**

Distribution of the RVQ by the Club Visioning Coordinator can be handled through email 2 weeks prior to the Club Visioning Event to all club members. SurveyMonkey allows for a survey to be posted online and accessed by anyone with the link. This allows easy distribution. SurveyMonkey will then track responses, allowing the administrator to easily ascertain which participants have not yet participated, and to automatically send out reminders. SurveyMonkey will also allow you to view and print responses, by participant, for review and distribution at the event. The District Visioning Chair will need to contact IFVC to have the RVQ template sent to the District's paid SurveyMonkey account.

## Rotary Visioning Questionnaire Master

Please complete all questions as your input is very valuable

### 1. General Information

Rotary Club Name

### 2. Our Rotary Club is healthy.....

Strongly Disagree

Disagree

Undecided

Agree

Strongly Agree

☐
☐
☐
☐
☐

comments

### 3. Our Club is known by many in the community.....

Strongly Disagree

Disagree

Undecided

Agree

Strongly Agree

☐
☐
☐
☐
☐

Comments

### 4. Our Club tries new ideas (activities, service, socials, formats) to be more relevant to our members and prospective members.....

Strongly Disagree

Disagree

Undecided

Agree

Strongly Agree

☐
☐
☐
☐
☐

Comments

### 5. Our Club is the right size for what we want to accomplish now and in the future.....

Strongly Disagree

Disagree

Undecided

Agree

Strongly Agree

☐
☐
☐
☐
☐

Comments

## 4. Distribution of Writing Exercise

The Writing Exercise (provided by the District Visioning Chair) should be sent electronically by the Club Visioning Coordinator only to the members of the club who will participate in the actual Club Visioning Event. This should be sent no more than 1 week, and no less than 3 days prior to the scheduled event with instructions to have the Writing Exercise completed and accessible during the first Club Visioning Session.

**VISION EXERCISE**  
*"The Club, not as it is, but as it has become..."*

**What would your club look like if you implemented a new Vision for your club in the next three years?**

Three years in the future, you are invited to a neighborhood party where you meet a few people who just moved to your community. You are in a conversation with a group who ask you how you got involved in the community. You tell them about Rotary and what your club has accomplished over the past three years. To help you organize your thoughts about what you would tell them, fill out the following pages.

Be brief with bullet points, sound bites, or headlines about what has happened in your club over the last three years using the specifics outlined on this form. Begin thinking about how your club aligned with the Rotary Action Plan which includes how you have accomplished the following: (\*See **Rotary's Vision Statement** handout)

- Increased your Ability to Adapt
- Expanded your Reach
- Enhanced Participant Engagement
- Increased your Impact

Do not express your intentions of what you would like to do with I will, I hope, or, I intend. Instead, describe your accomplishment with an action verb in the past tense. For example, we **increased** our Membership by 20. Or we **held** a family social once a quarter. Or we **received** a Global Grant for \$250,000 for Economic Development in Africa.

Place yourself fully in the future. What would you tell your new neighbors about your club's accomplishments over the last three years? Complete your exercise within the next 30 minutes.

Copyright © 2020 International Vision Facilitation Committee      Pg 1      Writing Exercise FINAL with light watermark

## 5. Club Visioning Session 1

Ask participants to login to the Zoom meeting 15 minutes prior to Session 1. Participants are held in the waiting room for admission by the Tech Host 10 minutes prior to the session. All members are brought in on "Mute." The District Visioning Facilitation Team welcomes the participants and ensures all of them have their names visible on the Zoom screen. Any "phone only" attendees are asked by the Tech Host to identify themselves. The Tech Host will "rename" them on the Zoom screen. The Zoom meeting should then be started at the scheduled time.

- Slide presentation template provided by **IVFC** (customized with club name)
- Start with a technical slide (slide 1) and have attendees “practice” raising hands, reactions, chat, and mute functions. Explain Gallery view and Speaker view.
- District Visioning Facilitation Team will introduce themselves (slides 2-3) starting with Tech Host then passing to the next ending at Presenter who has a list of attendees from registration. Quickly share slide 4. Stop screen share and put in Gallery view.
- Attendees are called by name by the Presenter, asked to unmute, and share their current club role and how many years they have been in the club.
- PowerPoint presentation begins. (Slides 5-11)
- Poll #1 launched (See technical resource guide: slide 12)
- Extraction explained (Slides 13-16) focus on “headlines, bullet points, tweets”
- Extractor calls on those with hands raised. Participant is asked to unmute and report his/her idea. Participants may also put their ideas in the chat. All the ideas in chat are read aloud stating the person’s first name and then the idea.
- Scribe documents directly into Extraction template in SurveyMonkey by Rotary Action Plan category in blocks for voting (see Club Visioning Guide). The District Visioning Chair will need to contact IVFC to have the Extraction template sent to the District’s SurveyMonkey account.

## 6. Extraction into Survey Monkey

**Training Video at <https://youtu.be/VQ4wbxc82Gg>**

Survey Monkey should be set up by a team member familiar with creating surveys and the ability to extract real time into the survey utilizing a screen share in Zoom meeting while the extractor calls on attendees to share.

The design of the survey follows the Writing Exercise with extraction into a single section for 2 or 3 questions where indicated by the RI Action Plan topic (Ability to Adapt, Expand our Reach, Club Engagement and Increase our Impact).

The survey should be set up with the number of “votes” under the Options tab and set to be exactly the number per section and require votes for each section. You will choose “checkboxes” so there won’t be a limit to the items listed during extraction. See example:



EDIT OPTIONS LOGIC MOVE COPY

Q1

Priority: Increase our Ability to Adapt  
How we are known and how we connect

4 Votes

Checkboxes

?

EDIT OPTIONS LOGIC MOVE COPY

☒ Require an Answer to This Question

Number of choices respondents must answer:

exactly 4

Display this error message when this question is not answered.

This question requires an answer.

?

**Scribing into SurveyMonkey: Staying in Design page and “edit” each section. Suggest save a template and then copy for each club.**



## Owensboro Club Visioning Voting Exercise Round 1

### - 1. Priority: Increase our Ability to Adapt How we are known and how we connect

4 Votes

- |   |   |
|---|---|
| <input type="checkbox"/> Representative of persons of color, ethnic backgrounds and various differences are engaged in Rotary | <input type="checkbox"/> Rotary is a critical part of Owensboro and seen as important             |
| <input type="checkbox"/> Leading diversity discussions in our community in a peaceful way                                     | <input type="checkbox"/> 2 face to face meetings per month  |
| <input type="checkbox"/> excellent programming relative to our community  | <input type="checkbox"/> 1 social event per month   |
| <input type="checkbox"/> known for making a difference  | <input type="checkbox"/> flexible fee structure   |
| <input type="checkbox"/> active supporters of children's programs in our community  | <input type="checkbox"/> 1 social activity per quarter  |
| <input type="checkbox"/> Rotarians are Doers - known for their service and giving back to the community                       | <input type="checkbox"/> 1 small family service project per quarter                               |
| <input type="checkbox"/> education of a co-existing world   | <input type="checkbox"/> 1 small service project per year for Rotarians unable to attend meetings |
| <input type="checkbox"/> reputation of a global impact  | <input type="checkbox"/> flexible dues schedule   |
| <input type="checkbox"/> a common meeting place for all in the community  |   |

### - 2. Priority: Expand our Reach

Because of our determination to grow our club size, we now have \_\_\_\_\_ members.

1 Vote

- ☐ 100  
☐ 80

### - 3. Priority: Expand our Reach

Attributes are who we are  
Public Image is how we communicate who we are & what we do

4 Votes

- |   |  |
|---|--|
| <input type="checkbox"/> at least 5 minority members  | <input type="checkbox"/> 75% of business leaders in Owensboro has heard the 4 way test.  |
| <input type="checkbox"/> 1/3 members < 40   | <input type="checkbox"/> 100% of business leaders in Owensboro has heard the 4 way test.   |
| <input type="checkbox"/> 10 members < 30  | <input type="checkbox"/> we have more ambassadors as a result of growing our membership and diversity  |
| <input type="checkbox"/> all adult generations are represented                                    | <input type="checkbox"/> we have used the Chamber and CVB resources for awareness and recruiting   |
| <input type="checkbox"/> diverse leadership   | <input type="checkbox"/> Used 4 way test to help community recognize the strength of accepting diversity   |
| <input type="checkbox"/> as a core value service is elevated                                      | <input type="checkbox"/> Leadership Owensboro has integrated a Civic Engagement Day of which Rotary helped to launch.                            |
| <input type="checkbox"/> 75% participation  | <input type="checkbox"/> our members realize they are Rotary ambassadors   |
| <input type="checkbox"/> age and ethnic diversity has increased to better represent our community | <input type="checkbox"/> our membership mentored middle and high students  |
| <input type="checkbox"/> more representative of the community                                     | <input type="checkbox"/> participated in the Rotary Youth Leadership Awards  |
| <input type="checkbox"/> community leaders participate in club                                    | <input type="checkbox"/> Fantastic social media committee that posts the accomplishments of our club   |
| <input type="checkbox"/> Rotarians are welcoming  | <input type="checkbox"/> Inform our community of our activities in local paper to include letters to editor, news releases and ad advertisements |
| <input type="checkbox"/> a Rotary effect in the greater Owensboro area                            | <input type="checkbox"/> Picked a month and declared it a Rotary Month to showcase activity of club  |
| <input type="checkbox"/> we have addressed a higher profile need in our community                 |  |

Training Video <https://youtu.be/ASYkQ4QzQC8>

## 7. Voting: Round 1

After extraction, show slides 17-18 and explain to the participants that the link for Round 1 voting will be placed in the chat (SurveyMonkey link from completed extraction).

Participants are asked to copy the link (or open in a second browser tab) and complete a survey within the next 30 min if possible. The Club Visioning Coordinator is responsible to email any attendees having difficulty in chat.

- Scribe can be the same as Tech Host; however, best practices suggests the Scribe be an additional team member with a shared screen for scribing.
- The District Visioning Facilitation Team meets to discuss which members should be combined into breakout rooms during Session 2. This discussion can be held at the Debrief held on Zoom after Session 1 ends.

## 8. Voting: Round 2

- Scribe verifies votes received from all participants and copies full SurveyMonkey results for preparation of Round 2 voting
- Scribe reduces choices from Round 1 Voting to the recommended number to gain consensus during Round 2 (see Voting instructions in Club Visioning Guide)
- Tech Host configures Zoom breakout rooms with assigned attendees
- Action Plan template and Round 2 Voting SurveyMonkey link is sent via email either by the Club Visioning Coordinator or the Scribe to attendees prior to Session 2. Who will do this needs to be discussed before Session 1 begins.

## 9. Club Visioning Session 2

Session 2 begins with slide 20; tech review. Again, verify everyone knows how to unmute when called upon and how to use chat. Slide 19 is not needed for a Virtual delivery.

## 10. Summary/Synthesis

- Prior to the start of Session 2, the Scribe verifies votes received and prepares Summary/Synthesis based on Action Plan. The Summary/Synthesis can be presented by a screen share by the Scribe of the SurveyMonkey results or be put on PowerPoint slides to be presented.
- Share slide 21 briefly then go to Gallery view while the Summary/Synthesis is shared

**Training Video of Summary** <https://youtu.be/pjTrz9n-GcE>

## 11. Vision to Success

Planner shares slides 22-31 to explain the Master Plan and Action Plan.

## 12. Breakout: Creating Action Plans

Participants are sent into breakout rooms by predetermined groups for 15 minutes with the instructions on slide 32

- Tech Host automatically sends the participants to the breakout rooms for 15 minutes with 1-minute warning
- Participants create an Action Plan from a predetermined goal
- Participants are brought back to main room to share their Action Plan
- Planner coaches the participants as they share their Action Plans

## 13. Vision to Success Assignments

Vision to Success template is shared on screen by the Scribe

- Scribe documents who volunteers for the assignments and by when they hope to have the steps accomplished as the Planner facilitates

## 14. Closing Remarks & Evaluation

- Thank participants
- Ask if there are any questions or concerns (see Club Visioning Guide)
- Launch Poll 2 as an Evaluation (noted above)
- Session ends and team debriefs