Club Visioning Guide

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OVERVIEW

A long-range plan provides the framework for each club's "Service Above Self." The simple act of writing down common goals builds camaraderie and fosters agreement. This renewed focus on objectives naturally pushes clubs and districts towards action. A Club Visioning session provides a shared Vision for the future and builds the foundation for a written plan that promotes consensus, consistency and continuity through clear communication.

INTRODUCTION

Rotary leaders recognize the crucial role of effective planning for Rotary club success. Many clubs and districts have participated in a Visioning Facilitation or equivalent program that helped define their missions, strengths, challenges, and especially, priorities. Such programs promote the necessity of and include follow-up action plans.

A Visioning process is intended to galvanize participants into Service Above Self. The goal of this Visioning program is to assist clubs in defining themselves and their priorities, and to create a plan to ensure successful outcomes.

A Visioning process **begins** by asking the Five Planning Questions:

- WHO ARE WE?
- WHERE ARE WE?
- WHERE DO WE WANT TO BE?
- HOW WILL WE GET THERE?
- HOW WILL WE KNOW WHEN WE HAVE ARRIVED?

A Visioning process **aligns** with the Rotary Vision Statement/Rotary Action Plan:

- INCREASE OUR IMPACT
- EXPAND OUR REACH
- ENHANCE PARTICIPANT ENGAGEMENT
- INCREASE OUR ABILITY TO ADAPT

UNDERSTANDING THE FIVE PLANNING QUESTIONS

The Visioning Process that you will experience is based on five key questions related to the planning process. They are:

1. Who are we?
2. Where are we?
3. Where do we want to be?
4. How will we get there?
5. How will we know when we have arrived?

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Question 1: Who are we?
Here we presume a club supports the Purpose of Rotary, the Object of Rotary, The 4-Way Test, The Rotary Action Plan, just to name a few of the basic tenets. But, we recognize, too, that the club has its own cultural awareness that contributes to answering "Who are we?" and "What do we stand for in our community?"

The club has a history that bears on the decisions it has made in the past and will impact those the club will make in the future. The club is a member of Rotary International which also influences its strategic thinking.

Question 2: Where are we?
A simple and informal assessment tool, called a Rotary Vision Questionnaire (RVQ) allows the club to fashion a collective response to 12 statements across different subject areas about the Rotary club.

There is no claim here for clinical precision of the statements offered or the opinions rendered by the respondents. Instead, the RVQ points out areas where each member and fellow club members "converge" or "diverge" in their individual perceptions about "where" the club is prior to the Club Visioning and where enhancements might be possible.

Question 3: Where do we want to be?
This is the essence of the Club Visioning process: ***"To see the Club not as it is, but as it could become."*** The many ideas that the club members who participate generate during the Club Visioning session summarizes and projects the desired "future" of the club in specific and defined categories with priorities recorded.

Question 4: How will we get there?
This question represents the "heavy lifting" required to achieve the "ends" engendered by the Visioning Exercise and is labeled **VISION TO SUCCESS**. At the conclusion of the facilitation event, the club is positioned to initiate two documents. First, the participants are shown how to development a **Master Plan** in which they decide what to accomplish in Year 1, Year 2 and Year 3. Secondly, they are shown how to create an **Action Plan** for each idea by turning the idea into a goal and defining the tasks needed to accomplish the goal. The act of writing down **WHO** will do **WHAT** by **WHEN**, what **RESOURCES** are needed, and what the **OUTCOME** is projected to be greatly increases the odds of success!

Question 5: How will we know when we have arrived?
As a club, the members define their desired results. The result of each goal is indicated at the bottom of the Action Plan where is says: **Outcome**. The accomplishments sought can be measured by quantitative as well as qualitative indicators. The club members then conceive their own "mileposts" and outcomes to gauge the club's cumulative levels of success.

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ROTARY'S VISION STATEMENT

TOGETHER WE SEE A WORLD WHERE PEOPLE UNITE AND TAKE ACTION TO CREATE LASTING CHANGE ACROSS THE GLOBE IN OUR COMMUNITIES AND IN OURSELVES.

ROTARY'S ACTION PLAN

As we stand on the cusp of eliminating polio, we find ourselves poised for our next challenge. The time is right to move toward realizing a new vision that brings more people together, increases our impact, and creates lasting change around the world. To achieve the vision of Rotary International and The Rotary Foundation, we have set four priorities that will direct our work over the next five years.

ROTARY'S STRATEGIC PRIORITIES AND OBJECTIVES

INCREASE OUR IMPACT
- Eradicate polio and leverage the legacy
- Focus our programs and offerings
- Improve our ability to achieve and measure impact

EXPAND OUR REACH
- Grow and diversify our membership and participation
- Create new channels into Rotary
- Increase Rotary's openness and appeal
- Build awareness of our impact and brand

ENHANCE PARTICIPANT ENGAGEMENT
- Support clubs to better engage their members
- Develop a participant-centered approach to deliver value
- Offer new opportunities for personal and professional connection
- Provide leadership development and skills training

INCREASE OUR ABILITY TO ADAPT
- Build a culture of research, innovation, and willingness to take risks
- Streamline governance, structure, and processes
- Review governance to foster more diverse perspectives in decision-making

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Facilitation Team Roles

It may be helpful to understand that each facilitator may have more than one role. We encourage the team members to watch how others perform the role, then practice the roles they have not done previously, and finally, perform the role at a live Club Visioning Event.

We suggest that all facilitation team members study the **On Site Facilitation Tips** and the **Virtual Facilitation Tips**, as well as **How to Practice with your Team** at the end of this guide. These tips should help everyone get more comfortable with the nuances of facilitation techniques and practice when you start working with clubs.

ON SITE:

Four facilitators are needed so that during extraction you can have an Extractor, two Scribes, and a Runner/Traffic Cop to put the newsprint on the wall. The Lead decides which facilitator has the most appropriate skill set to deliver the Club Visioning Summary/Synthesis, a critical part of the process.

LEAD: The Lead works directly with the Club Visioning Coordinator to set the dates and the location. Together, they coordinate the delivery of the Club Assessment, RVQ (entire club) and Writing Exercise (event participants only). The Lead assigns team roles for the event and confirms with the Club Visioning Coordinator prior to the event that the participants and club leadership will all be present. The Lead does the Closing Remarks (Thanks the club). The Lead sends out Vision to Success documents after the event.

PRESENTER: The Presenter delivers the initial PowerPoint information to the participants. The Presenter also manages introductions.

EXTRACTOR: The Extractor solicits club member vision ideas by calling on participants who raise their hands and then works with the participants to "soundbite" their responses for the Scribes to capture on the flipchart newsprint. The Extractor ensures full club member participation by noticing and calling on members who are not participating.

SCRIBE: The two Scribes write extracted ideas from the participants on flip chart newsprint in "soundbites." One person serves as the Traffic Cop/Runner to put the charts on the wall and affix the blue tape between Categories. A Scribe or another team member provides instructions for both rounds of Dot Voting. The Scribes assist with counting dots and organizing the flip charts for Round Two Voting. A Scribe or another team member presents the Summary/Synthesis. A Scribe might also assist the Planner during the Vision to Success portion when members volunteer for the assignments.

PLANNER: The Planner presents the Vision to Success portion of the Visioning event (including Master Plan and Action Plan), facilitates the Action Plan Practice by separating the participants into groups of three, and asks for volunteers for the assignments to begin implementation of the Vision while the Scribe captures the names and dates of each of the six assignments on the flipchart newsprint. Familiarity with the development of the Action Plan and Master Plan as well as the Vision to Success Guide is important.

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VIRTUAL:

Three facilitators can easily accommodate extraction with one extracting, one scribing, and one reading the chat.

LEAD: The Lead works directly with the Club Visioning Coordinator to set the dates and virtual meeting platform. Together, they coordinate the delivery of the Club Assessment, RVQ (entire club) and Writing Exercise (event participants only). The Lead assigns team roles for the event and confirms with Club Visioning Coordinator prior to the event that the participants and club leadership will all be present. The Lead does the Closing Remarks (Thanks the club). The Lead sends out Vision to Success documents after the event.

PRESENTER: The Presenter delivers the initial PowerPoint information to the participants. The Presenter also manages introductions.

EXTRACTOR: The Extractor solicits club member vision ideas by calling on participants who raise their virtual hands and then works with the participants to "soundbite" their responses for the Scribe to capture on SurveyMonkey. The Extractor ensures full club member participation by noticing and calling on members who are not participating. The Extractor may either read the ideas in chat or another member of the team might be instructed to read the chat for the Extractor. The chat ideas must be read aloud stating the member's first name and the idea so all participants can hear the ideas out loud before voting.

SCRIBE: The Scribe has an expanded role in a virtual Club Visioning Event. The Scribe captures all the vision ideas in "soundbites" on a SurveyMonkey template, sets up two rounds of online Voting, and conducts a Summary/Synthesis of club results. Before a virtual event, the Scribe sets up the SurveyMonkey template for extraction. The Scribe shares this template on the screen during extraction and types the responses on the form as the ideas are extracted. After the extraction is complete, including consolidation, the Scribe closes the form and provides a link to the survey in chat.

After Round One Voting, the Scribe makes a copy of Round One ideas, selecting only the top 5-7 priority ideas, and sends a new link for Round Two Voting either in chat or via email between sessions. After Round Two Voting is complete, the Scribe either makes a slide or shares the SurveyMonkey graph while summarizing/synthesizing the voting results to help members see their club's vision. In the virtual venue, we have found the Scribe to be in the best position to conduct the Club Vision Summary/Synthesis as the Scribe has been analyzing club member ideas when creating the Round Two Voting survey.

While the Planner asks for volunteers for the assignments in Vision to Success, the Scribe screen shares a MSWord template to capture the names and dates of each of the six assignments.

PLANNER: The Planner presents the Vision to Success portion of the Visioning event (including Master Plan and Action Plan), facilitates the Action Plan Practice by utilizing Zoom breakout rooms, and asks for volunteers for the assignments to begin implementation of the Vision while the Scribe screen shares an MSWord template to capture the names and dates of each of the six assignments. Familiarity with the development of the Action Plan and Master Plans as well as the Vision to Success Guide is important.

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TECH HOST: The Tech Host role is required to operate the virtual technology platform and address any technical problems or questions that participants have. The Tech Host schedules the Zoom meeting, sets up screen sharing for the facilitation team, arranges breakout rooms, admits participants, takes an online club picture, and records the Visioning event. The Tech Host also helps any participants having problems using the virtual tools. During the extraction, the Tech Host helps read the chat or notes any hands raised of which the Extractor may not be aware.

BEFORE THE SESSION

Time for Action

Clubs can benefit from basic planning concepts in a straightforward Visioning for Rotary Clubs procedure, led by a small team of non-club-member District leaders in a program of approximately four hours.

Below is a sample Pre-Event Timeline, with steps that involve the Facilitation team listed in Blue. This timeline is a general guideline to follow, though you may find additional communications will occur other than the steps listed. Some clubs will require more attention than others to get them prepared for the Club Visioning Event.

Example of Pre-Event Timeline

Approximate # of Days from Event	Description
120 days before	Discuss Visioning Event with District Visioning Coordinator/Lead and Club Visioning Coordinator. District Visioning Coordinator/Lead explains how to coordinate the event.
90 days before	Confirm club is ready to experience the Club Visioning Event and coordinate date with club availability and Facilitation team availability. A copy is sent to the Assistant Governor.
60 days before	Club members are invited to participate in the Club Visioning Event. Important to include President, President Elect, President Nominee, past leaders, and a mix of old and new members. Most clubs should invite 15-30 participants, with the ideal being 18-23.
45 days before	RVQ is sent to all participants. Club Profile is sent to President. Club Visioning Coordinator provides the list of participants for the Club Visioning Event.

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38 days before	RVQ reminder is sent by the Club Visioning Coordinator to all participants who have not yet responded.
31 days before	Club Visioning Coordinator reaches out to participants who have not responded to the RVQ.
30 days before	Benefits of Visioning/Planning presentation given at the club. This is performed by a District Visioning Facilitation team member or an Assistant Governor. A PowerPoint is available on the IVFC website for this presentation.
21 days before	President has 2-3 members talk about why they joined Rotary and why they stay.
21 days before	Writing Exercise and resources are distributed to Club Visioning Event participants.
14 days before	District Visioning Coordinator/Lead confirms with Club Visioning Coordinator that all is on track and ready to go; confirms date(s), time, number of participants.
14 days before	District Visioning Coordinator/Lead sends out RVQ results and copy of Club Profile to District Visioning Facilitation team & Assistant Governor.
14 days before	Club President has someone present to club members a list of past service projects, donations that club makes, and fundraisers that the club does.
14 days before	District Visioning Coordinator/Lead confirms agenda and role assignments with Facilitation Team.
7 days before	District Visioning Coordinator/Lead confirms with Club Visioning Coordinator that all is on track and ready to go; confirms date(s), time, number of participants. A copy is sent to the Assistant Governor.
7 days before	District Visioning Coordinator/Lead confirms with Facilitation Team and sets up rehearsal time.
7 days before	District Visioning Coordinator/Lead sends out Zoom meeting instructions to club participants and Assistant Governor. (if virtual)
3 days before	District Visioning Coordinator/Lead sends out Zoom Invitation to club participants, District Visioning Facilitation team, and Assistant Governor. (if virtual)
1 days before	District Visioning Coordinator/Lead confirms with Club Visioning Coordinator that all is on track and ready to go; confirms date(s), time, number of participants.

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Responsibilities of the Club Visioning Coordinator & District Visioning Coordinator/Lead

The Rotary Club requesting a Club Visioning Event will identify a "Club Visioning Coordinator" who will coordinate the entire event before any event planning activities begin and provide visioning outcomes back to the District Visioning Coordinator/Lead (some Districts choose to perform this role with a District Visioning Coordinator, others have the Lead work directly with the Club Visioning Coordinator).

The District Visioning Coordinator/Lead will establish contact with the Club Visioning Coordinator to set the date(s) for the facilitation event, sets a date for a PowerPoint to the club, and discusses how & when to outline club expectations.

The forms listed below for the Club Visioning Coordinator in the next three steps are downloaded from the District website (or will be sent to them) prior to the event so that the club understands the process and begins working on the timing of the event.

The first two tools help the club answer prior to the visioning event, the two planning questions: "Who are we?" and "Where are we?" These two documents will be sent again in the future to help club leaders ascertain what and where progress is being made after the Club Visioning Event.

1) The **Club Profile** is sent to the Club Visioning Coordinator 4-6 weeks preceding facilitation with the expectation that he/she will work with the President to answer the 7 questions.

2) The **Rotary Vision Questionnaire (RVQ)** link is sent to all club members 4-6 weeks preceding facilitation with the expectation that the results are sent to the District Visioning Coordinator/Lead two weeks before the scheduled Club Visioning Event.

Rotary Vision Questionnaire (RVQ) information is collected by the District Visioning Coordinator/Lead and a summary of results sent to the District Visioning Facilitation Team.

The next step before the Club Visioning Event is to start to answer the planning question: "Where do we want to be?"

3) The **Writing Exercise and attachments will** be sent to the club members participating in the Club Visioning Event to help them start to think about what their club can accomplish in the future.

The following page (and attachments list) is the **content of the email** sent out by the Club Visioning Coordinator to the club members participating in the Club Visioning Event.

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Dear Club Visioning Event Participant,

Here is the information you need to know to prepare for the session:

ONSITE:

1. **Meeting Invite**: You will receive a reminder from your Club Visioning Coordinator of the upcoming Club Visioning Event which will be occurring at ***ADDRESS*** on ***DATE*** at ***TIME***. A light dinner will be served and we will adjourn at approximately ***TIME***.

VIRTUAL:

1. **Meeting Invite**: You will receive a District Zoom Meeting invitation. You must **REGISTER** for the Visioning session/sessions when you receive the Zoom Meeting invitation from the district in order to get the meeting link. Plan on joining the session about ten minutes before the scheduled event so we are ready to begin the Club Visioning promptly at the appointed time. Zoom instructions are attached for those of you who may not be familiar with using Zoom.

FOR BOTH:

2. **Rotary International Vision Statement**: A Vision outlines direction and priority initiatives. Rotary International has created an updated Vision Statement and four Strategic Priorities (attached) that focus on how to grow Rotary. Information about different Rotary Club Models and The Rotary Foundation programs are also attached for your information as you reimagine your Rotary club.

3. **Club Visioning and Writing Exercise homework**: A Club Visioning outlines a shared direction and consensus on priorities. To help create our club vision, the District Visioning Facilitation Team is asking each Club Visioning Event participant to complete the attached Club Visioning Writing Exercise with your ideas for our club. The Writing Exercise takes about 30 minutes to complete. The questions lead you through different aspects of the club and how it operates. I suggest you write your ideas as "sound bites" or 3-5 word “bullet points.” Everyone's ideas from the Writing Exercise will be extracted and recorded during the Club Visioning Event. **It is important that you jot down your thoughts about your vision by completing the Writing Exercise before the session. Bring your completed Writing Exercise to the meeting.**

Please let ***Name/Email*** (the Club Visioning Coordinator) know if you have any questions about the Club Visioning Event, Visioning materials, or the Writing Exercise

Thank you,

Name
Club Visioning Coordinator

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ATTACHMENTS: These documents are available on the IVFC website and can be accessed, downloaded, and shared with you by your District Visioning Chair
Writing Exercise
RI Vision Statement/Rotary Action Plan
Rotary Club Models
The Rotary Foundation Programs

After the email with the Writing Exercise and attachments has been sent out, the Club Visioning Coordinator updates the District with the following information:

ON SITE: The Club Visioning Coordinator provides the District Visioning Coordinator/Lead with details (number of participants, confirm start time, and directions to the site of the facilitation) a minimum of one week prior to the Club Visioning Event which is then distributed to the team of District Visioning Facilitators.

VIRTUAL: The Club Visioning Coordinator provides the District Visioning Coordinator/Lead with details (number of participants, names of participants, confirm start time) a minimum of one week prior to the Club Visioning Event which is then distributed to the team of District Visioning Facilitators.

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DURING THE SESSION

EVENT TIMELINES

Please ask your District Visioning Chair to access, download, and share with you the On-Site Cheat Sheet and the Virtual Cheat Sheet. Refer to the cheat sheet to help you during the event. Many facilitators have found it helpful to use the cheat sheet for timing, to assist in guiding them through the event, and to help keep the entire Club Visioning process front and center. The timelines you see below are included on the cheat sheet along with additional resources.

ON SITE - Schedule

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 **welcomes** all to event
5:20 – 5:30 Present the **PowerPoint** *(while everyone is eating)*
Includes Intro of the 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

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VIRTUAL - Schedule

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 convener) 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**

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INTRODUCTION

ON SITE: Session Set-up

The District Visioning Facilitation Team arrives 30+ minutes before the start of the session to begin setting up the materials.

- Verify your team understands their roles:
  - Lead
  - District Visioning Facilitation Team members (with assigned roles)
  - Club Visioning Coordinator
- Club provides tent cards with names and roles of each participant on both sides, to be placed on tables (District team should always have spares with them in case club does not provide).
- Prepare signage to help participants navigate to the correct room
- Print a copy of the Handouts for each member
  - Print 10% extra (or 3 extra, whichever is larger) to allow for the unexpected
  - Extra copies of Writing Exercise for those who forgot theirs/did not fill out ahead
  - Action Plan forms for Practice session
- Use a format that allows people to see each other
  - **(PREFERRED)** U-Shaped setup allows everyone to see everyone else, most conducive to ease of extraction
  - Round tables can help with the small-group activity during the session
- Plan where wall charts will go
- Prepare and test the technology setup; do a quick run through of your materials to verify everything is ready
- If a meal is planned, participants should arrive 15 – 30 minutes before start of session, get food, and get ready
  - Avoid heavy or sleep-inducing foods
  - Avoid alcohol until afterward!
- Begin on time

VIRTUAL: Session Set-up

Have your District Visioning Facilitation Team log in 30+ minutes before the start of the session to do sound/visual checks, review roles, schedule, team transitions, and technology

- Verify your team understands their roles:
  - Tech Host
  - Lead
  - District Visioning Facilitation Team members (with assigned roles)
  - Facilitators rename to: First Name/Last Name/Facilitator
  - Club Visioning Coordinator
- Tech Host starts letting participants in five minutes before start time
- Tech host asks participants to rename themselves and explains how
- Facilitators welcome participants as they come in
- Set view to gallery view
- Open chat box and begin on time
- Tech Host reviews Rules of the Zoom

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OPENING STATEMENTS/POWERPOINT

The Club Visioning Coordinator (or Club President) introduces the Lead Facilitator and welcomes everyone.

Slide: Introduction of facilitation team

Our District is fortunate to have a great Facilitation team. This team has been invited to your club to take you through the Club Visioning Facilitation process. We will introduce ourselves. I am…. (Each team member tells: name, club, number of years in Rotary.)

Slide: Introduction of participants

ON SITE

Now, I know that you all know each other, but it would be helpful to us if we could go around the room and have each of you tell us who you are. Please give us your name, number of years you have been in Rotary, and your position in the club such as treasurer or a member. Let's start over here and go around the room.

VIRTUAL

Now, I know that you all know each other, but it would be helpful to us if each of you could tell us who you are. I will call on you by your first name and then please unmute and share your name, number of years you have been in Rotary, and your position in the club such as treasurer or a member. (Have a list of club members who are participating. Also, you should be able to see their first names on the screen. Call on them by first name.)

Slides: Rotary International Vision Statement and Action Plan

The structure for Club Visioning starts with Rotary International's Vision Statement which reads: **Together we see a world where people unite and take action to create lasting change across the globe, in our communities, and in ourselves.** You will also be creating your own Vision Statement through the Visioning process.

The framework for the Club Visioning experience aligns with Rotary International's Action Plan. There are four strategic priorities that compose the Action Plan in no particular order: Increase our impact, Expand our Reach, Enhance Participant Engagement, and Increase our Ability to Adapt. Your Writing Exercise took you through this framework and then added Fundraisers and Foundation. (If the club has a Club Foundation, then refer to that here and be sure to add two dots if on site or two more votes if on the virtual venue.)

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Slide: Process & Outcomes – Five Planning questions

USE ONLY if an RVQ was sent out

When strategic planners are working with any organization, they ask five planning questions. You are the Rotary club of XXXX. The Rotary Visioning Questionnaire you filled out and the Club Profile your President filled out helped us answer the first two questions: "Who are we?" and "Where are we?" Today we are going to work on the third question: "Where do we want to be?" Once you come to consensus on your vision, it will become the foundation to answer the next two questions. You will develop goals and action steps. Like any good plan, you will have measurements and time frames, so you know when you have succeeded.

START HERE IF NO RVQ

When strategic planners are working with any organization, they ask five planning questions. You are the Rotary club of XXXX. Today we are going to work on the third question: "Where do we want to be?" Once you come to consensus on your vision, it will become the foundation to answer the next two questions. You will develop goals and action steps. Like any good plan, you will have measurements and time frames, so you know when you have succeeded.

Slide: How you will accomplish the Process

USE ONLY if an RVQ was sent out

As I mentioned, you were asked to fill out a Rotary Visioning Questionnaire about your club as it is "today." While we will not use that information in our session, it is important that you have a starting point for where your club is now. This helps your club leaders have better knowledge about what the club knows and what the club is missing at this time.

The Writing Exercise that you filled out encouraged you to put yourselves three years in the future, and look back at what you accomplished. By having each individual do this exercise, it allows all of you to hear where you find commonality of purpose and where someone may see areas the club can do things in new ways. The only way a leader in the club can successfully take the club where they want to go is to have that input and agreement from the members. In addition, if the club has a plan, it should make it easier for future leaders to step into a leadership role. They become the steward of a plan that the club has created.

The beauty of the Writing Exercise is that it asked you to look at the areas that well-balanced Rotary clubs focus on. For instance, community service, how you serve youth, how you operate together as a club, etc. From these areas of interest and focus, you begin to create your vision.

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Slide: Visioning Across the World

You are not alone in wanting to make a difference here in your club in this community. There are currently 150 Districts participating in Club Visioning around the world in places like Sweden, Norway, Australia, New Zealand and even the Caribbean Islands. This has been going on since 2002, starting with a club in Wisconsin. Each of these districts has trained facilitators helping their clubs envision a Rotary club with better consistency, continuity, consensus, and communication in planning what they want to accomplish. And, over that period of time, as some of the early clubs have accomplished their plans, they have done a second and even a third Club Visioning session to create new plans for their club.

Slide: Key Concepts for Visioning

The Visioning process leads the attendees to a consensus of who they want to be and what they want to achieve. Since the club leadership team is in attendance, the club develops continuity from one year to another and this leads to consistency of focus and purpose. What ties this process together is communication. If there is no communication, nothing gets done or achieved.

ON SITE: Allow 5-10 minutes to clean up from the meal, then continue. Begin the next part with the Extractor leading.

VIRTUAL: Turn the session over to the Extractor.

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EXTRACTION/SCRIBING

The Extractor pulls thoughts from the room, while keeping the discussion vibrant and positive. Allow **75 minutes,** though times may vary depending on the number of participants.

Preparing the Participants for Extraction

You will have six slides to help you create the mind set you want the participants to have in order to do effective extraction. Let's go over those slides.

Slide: Mental Time Travel

Both on site and virtual, you set the participants up to use past tense verbs. So you say: Walt Disney said, "If you can dream it, you can achieve it." We asked you to dream your club's future in the Writing Exercise. This process helps your club to manage changes as your club grows. As we ask for your ideas, please use action verbs in the past tense such as: We completed, We raised, We achieved, We started, etc.

VIRTUAL add: Do the Poll to have an interaction since they have been listening to a PowerPoint presentation for a while.

Poll: As I completed the writing exercise, I thought this about our club in 3 years:

1. Our club is doing amazing things and will continue for 3 years
2. Our club is doing well and has room to improve in 3 years
3. Our club has lots of room for improvement in 3 years

Report Poll results.

Slide: What your club can become

With this slide, you prepare them to project themselves into the future. You say: We asked you to try to place yourself three years into the future looking back on what you have accomplished, seeing your club as it has become three years from now. We use this perspective so you can resist the urge to say we will do, or we will try to do, or we will add. We want to say it is three years from now and we have accomplished all that we have dreamed about.

Slide: The Writing Exercise

Both on site or virtual, you ask them to get their Writing Exercise.

ON SITE: You might say: Please get out your copy of the Writing Exercise. We have extra copies of the Writing Exercise if you forgot to bring yours. You can use it to follow along and share your ideas. You will need that to reference in this next step. The slide shows the Writing Exercise document.

VIRTUAL: You might say: If you don't have your completed copy of the Writing Exercise please go get it now or have access to the digital, completed copy. If you forgot yours, a pdf of it is in the chat so download it so you can follow along and share your ideas. You will need that to reference in this next step. The slide shows the Writing Exercise document.

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Slide: Extraction

You need to prepare them to be brief. What you can say is on the slide under notes. Say something like: So, we're going to start working through your Writing Exercise and get all of your ideas captured. I will give you the category which we will extract and the Scribe(s) will be recording your ideas. Keep in mind that we are looking for concise but accurate information to post. If we don't have your idea charted correctly, it will be difficult for others to vote on when we get to that point. So please help make sure your idea is captured accurately.

Also, think about being a "headline writer." You may have written your idea in a paragraph, but for purposes of posting, we want to bring that paragraph to a short phrase or headline or bullet point or Tweet.

We will be asking all of you for your ideas. Finally, don't worry about the details of your ideas right now. We just need to get the broad idea captured. We can sort out the details later.

Slide: Examples of Headlines, Bullet Points and Tweets

Give a few examples before you start extracting. Say something like: Here are some examples of how to share your ideas before we start extracting.

Increase our Ability to Adapt
- Fun Club
- Started a Satellite

Expand our Reach
- 50% male/50% female
- New brand shirts purchased

Enhance Participant Engagement
- New members did service project
- 50% graduated from the Rotary Leadership Institute

Increase our Impact
- 10 new park benches provided
- 2 water wells in Malawi installed

ON SITE

The physical set up for on site will be in a U-shape. You can see each person raising his or her hand quite easily. Say something like: "Please raise your hand and I will call on you so everyone won't be talking at once. Make sure that you speak up so that our Scribes, who will often have their backs to you, can hear your answers." If several people raise their hands, you say: "First let's have John, then Susie, then Mike." You have acknowledged the people whose hands are raised and given them an order in which to respond. Be sure to remember the order.

VIRTUAL

On the virtual venue, you will have a full screen of participants. It is important for you to have good control of the Zoom room. You do the same thing to keep order. You say something like: "Our first category is Increase our Ability to Adapt. Let's hear your ideas in an orderly way, so please raise your hand in either the participants or reactions function and I will call on you to unmute and respond." If there are several hands raised, you do the same thing as in person. You say: "First let's

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have John, then Susie, then Mike." You may also add that they may put their brief idea in the chat but encourage verbal participation.

Extraction Techniques

Repetition

Repeating what the person says has two purposes. First it gives the scribe(s) time to accurately write the idea. Secondly, it slows the pace so all ideas get captured. Sometimes you will have to take a long sentence and give it a concise bottom line. For example: We changed our fundraiser to a golf tournament after doing the art auction for eight years and raised $10,000. You bottom line it and say: Golf Tournament/$10,000.

Shaping behavior

Immediately, you need to shape the groups behavior in two ways. First, if they fail to use past tense verbs, correct them as you recite the stated response to the Scribe. For instance someone might say: We are going to build a playground in the park. You say: Built a playground in the park. So change build which is present tense to built which is past tense. If you do that several times right at first, they catch on and continue then to use past tense.

Second, if someone just yells out his or her idea, you gently remind that person that you will call on him or her to respond with the idea when it is his or her turn. You need to keep control of the room so there is not chaos, especially on the virtual venue.

Order of Speaking

Again, I will reiterate, when you have several hands raised, just put them in order. Say: "I am excited about all the hands raised. Let's have Judy, then Sam, then Jane." But the trick is to remember the order. Then ask for more ideas. When the ideas start to wane, then move on to the next question.

VIRTUAL: Reading the Chat

It is important on the virtual venue not only to have participants raise their hands, but also, to acknowledge the ideas that have been put in the chat. Assign a team member who is not the Scribe to help read the chat or at least to alert the Extractor that someone has put something in the chat. When reading the chat, say the person's first name and then the response. If the response needs to be briefer or corrected to past tense, please do it before the Scribe gets it on the list. The Scribe will often times just copy and paste, but it needs to be read aloud anyway. Best practice is for the person assigned to read the chat state the response before the Scribe writes it on the list. If the Scribe copies and pastes, have the Scribe correct at least to past tense. Decide before the session begins if the team will have a separate person read the chat or if the separate person will just alert the Extractor to ideas in the chat.

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ON SITE: Raised hand acknowledgement

Once you see hands raised, invite a person to share an idea with your hand open and palm up. Do not point at a person.

VIRTUAL: Watching for Raised Hands

The same team member who might read (or alerts there is an idea in) the chat can also look for raised hands for the Extractor. When a pause occurs, just let the Extractor know that a hand is or hands are raised. Let the Extractor call on the person or participants. It is tempting to call on the person yourself, but let the Extractor control the Zoom room as ideas are extracted.

Topics to Extract

Writing Exercise was designed using the Rotary Action Plan which has four Strategic Priorities plus Fundraising and Foundation. There will be several questions that you will ask under each of the four priorities.

Increase our Ability to Adapt

1. Because of the Vision we pursued our club is known for the following
2. Because we embraced flexibility and changed our club to be more relevant to our membership and our community, our club now

Expand our Reach

1. Because of our determination to grow our club size, we now have _____ members.
2. Because of our efforts, our club attributes are now
3. Because of our attention to Public Image, we increased awareness of Rotary in our community by

Enhance Participant Engagement

1. Because of our attention to engaging our members, we
2. Because we provided the following Leadership Development and Skills Training, we

Increase our Impact

1. Because we valued serving our community, we took part in the following
2. Because we are an International Service club, we also

When Voting, the participants do not vote for each question, they vote for the ideas within the Category which might have had two or three questions within it.

After extracting from the Rotary Action Plan priorities, then add Fundraising and Foundation. For Fundraising, you just want them to provide the name of the fundraiser and the amount they have raised. For instance: Held a scavenger hunt/raised $5000 or merely: Scavenger Hunt/$5000. If they add two sentences to it, again get them to bottom line with just the name and the amount.

For Foundation, some items may need to be explained. Someone might say: 100% EREY. If you have some newer members, they may not understand EREY. So when asked, turn it back to the group to have them explain. If no one knows the answer, then tell them. It is better for the Scribe(s) to write out what the acronym stands for.

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Blending Ideas

It is always best to put everyone's ideas up unless it sounds the same. If it sounds the same as another idea, then just ask the person if it is the same as another or if they want the idea to be charted as is. Abide by what the person says. Most usually the person will allow you to blend it with another idea.

Ideas moved to different categories for voting

Sometimes there will be an idea you may think would go in a different voting category. For instance, someone might say that they want an Instagram account for their club under Increase our Ability to Adapt. That might be a Public Image idea under Expand our Reach. So after all the extraction is done, ask them if they want to keep it under Ability to Adapt or put it under Expand our Reach. Abide by whatever they say.

Extraction/Scribing Overview

ON SITE: Extractor/Scribe

Extractor: Thoughts will be recorded using two Scribes who will be alternately writing paraphrased notes on the flip chart newsprint. The "switching off" between Scribes is to save time. The Extractor plays a pivotal role in harnessing the "feedback" from the members, drawing out their thoughts, and helping the Scribes by paraphrasing when needed. Extractors must instruct the club members to only speak one at a time and to respect the response of the individual talking. Extractors should also explain to the group how we are looking for their written ideas, but delivered as a "headline," "tweet," or "sound bite." The Extractor then works in conjunction with the Scribes ensuring proper pace and content interpretation. They repeat and/or paraphrase ideas to help the Scribes in writing them on the newsprint. The Extractor is the one who continually suggests participants rephrase their ideas into tighter, shorter statements.

> Scribes should use blue and/or black markers to record (please reserve red markers for the summary/synthesis).

The process of drawing out the feedback will mean that the Scribes are trying to grab the concept in the least number of words and then writing them on the flip chart. When the participants get excited about certain subjects, they will start talking quickly and on top of one another. You, as the Extractor, MUST manage this so the Scribes have a "writing" chance.

The Extractor may also have to change the tense of the verb. If this is done in the first question consistently, the participants will quickly learn to change their present tense verbs to past tense. So for example, if a participant says: Build a bus shelter. The Extractor would change that to: Built a bus shelter. The Scribe would write the past tense verb on the chart. After a few changes of the verbs, they will start modifying their verbs to past tense.

The collection and scribing of their written ideas are put into Categories. Each Priority of the Rotary Action Plan has several questions that make up the Category. The Extractor will not ask them to prioritize or discuss or debate anything at this point. This is a time to collect the ideas only. Members simply share with the group what they have written for each of the Writing Exercise

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questions. Collect this information on the flip chart newsprint by Category. The Scribes will put a heading on top of the flip chart for the Category they are collecting.

Number the flip chart sheets. On the first flip chart sheet place a #1 in the upper right hand corner. Then label the first Category with the title: "Ability to Adapt." There will be two questions under that Category that you as the Extractor will ask the members to respond to. First you will ask for ideas about what the participants believe their club stands for in their community. Then second under the category of "Ability to Adapt," you will ask the second question about what the club changed to be more relevant.

Ask participants to raise their hands so you can call on them to respond. Avoid starting at one end of the room and moving on to the very next person. Ask for input from various people on all sides of the room without following the "line-up" approach. Keep filling in the flipcharts with headers and numbers until you have captured everyone's ideas for the questions under that Category.

The purpose of the Written Exercise is to have each member INDEPENDENTLY write down his/her perspective of the club; this is NOT a group fill-in. Once you have gathered all of the ideas on the flip charts, the Writing Exercises can be thrown away or the participants can keep them. The objective is to get the ideas independently created and group collected (all within your allotted timeline).

Have another facilitator, (who may be an extra team member, an Assistant Governor, or someone who has come to observe) who is called a Traffic Cop/Runner, post the wall charts in order around the room. During the extraction, a "best practice" for the Traffic Cop/Runner is to utilize a brightly colored masking tape (blue painter's tape is recommended) to delineate between each Category for the purpose of voting. This will enhance the "Dot Voting" which follows. Remember there are two or three questions that become one Category for each of the four Priorities of the Rotary Action Plan.

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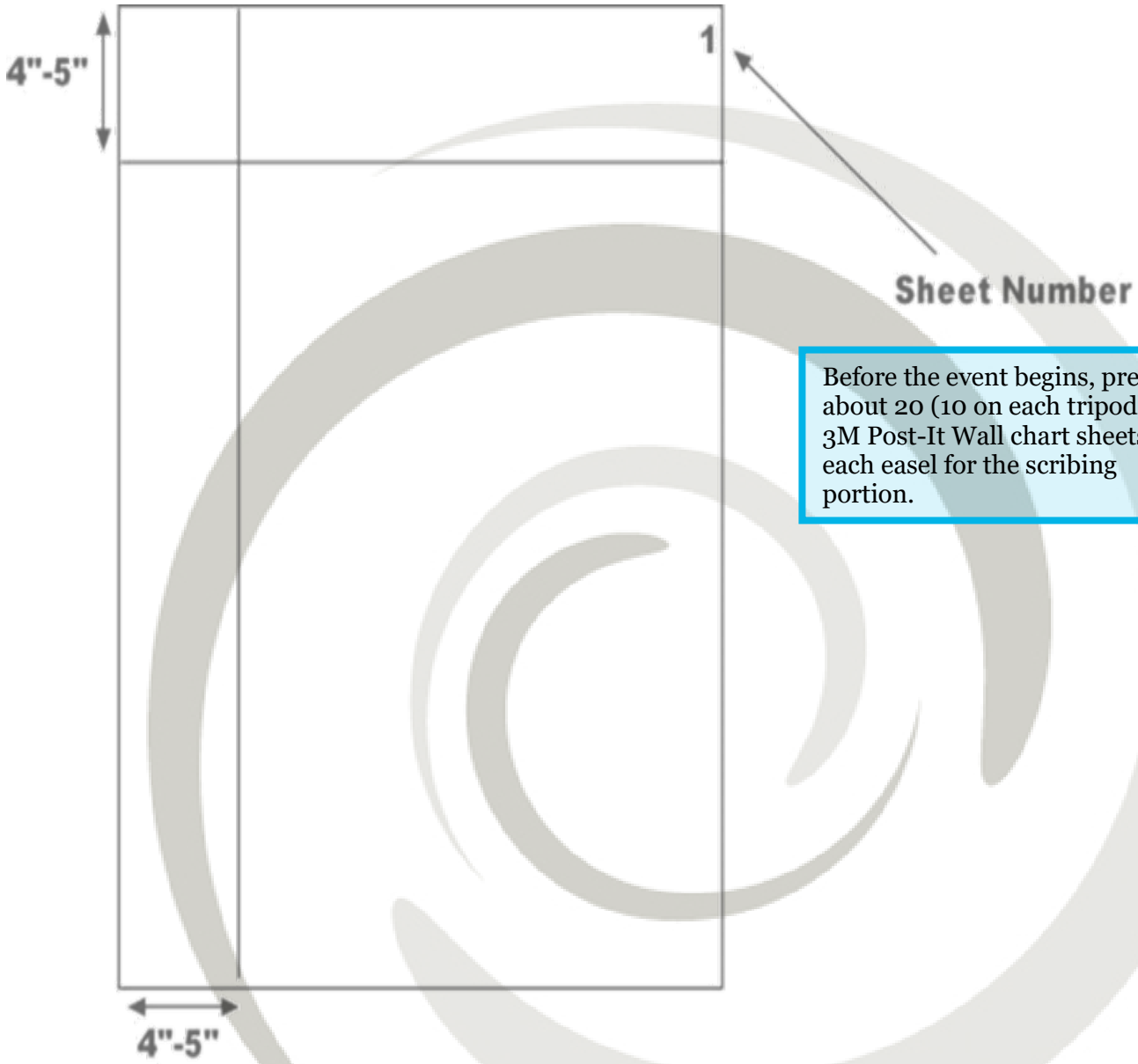
Flipchart Samples



Before the event begins, prepare about 20 (10 on each tripod) 3M Post-It Wall chart sheets on each easel for the scribing portion.

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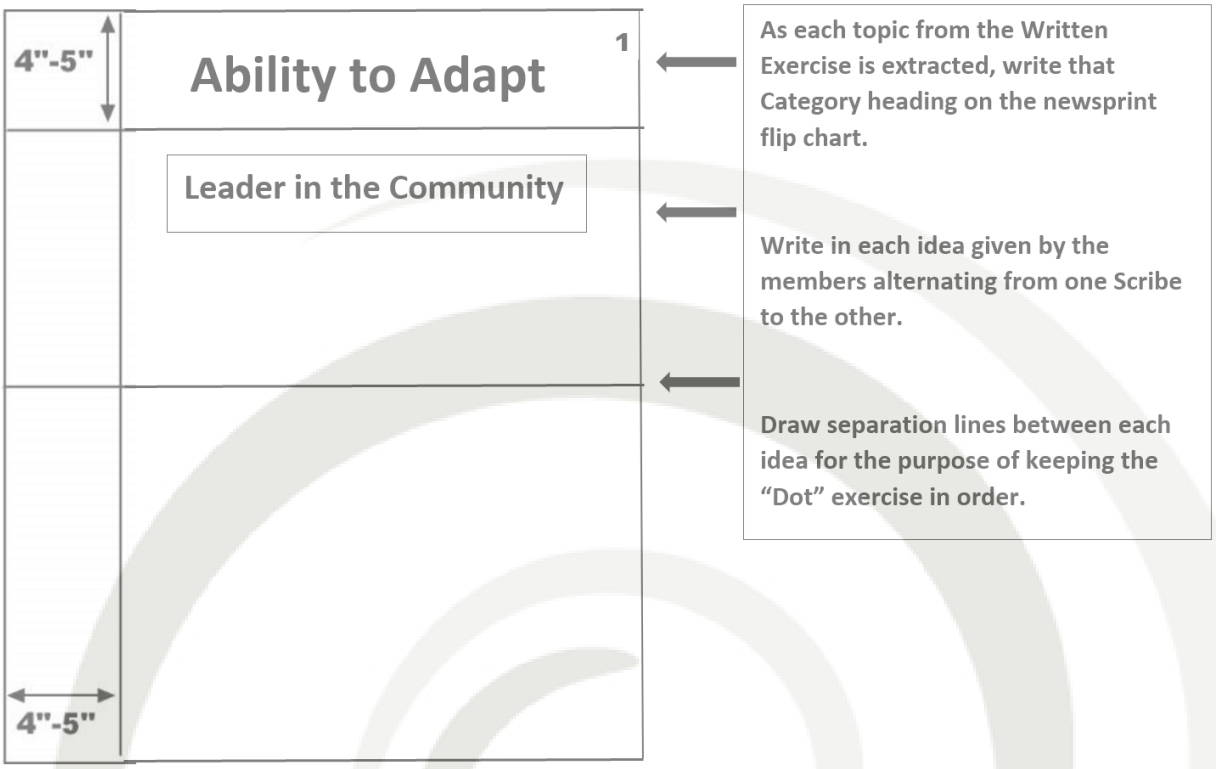

1. Consolidate any duplicates in a Category after the extraction is over. Or when you are gathering the original ideas, just say: "The idea is similar to this earlier one, do you want to create a new idea or are you OK with the first idea?") Accept whatever the participant indicates.

2. For the Club Size Category (which only gets one dot vote), take all of the ideas from the participants by going around the room one after another. Write the numbers on the right side of the page and re-write them in five ranges in descending order from the smallest numbers to the largest on the left side.

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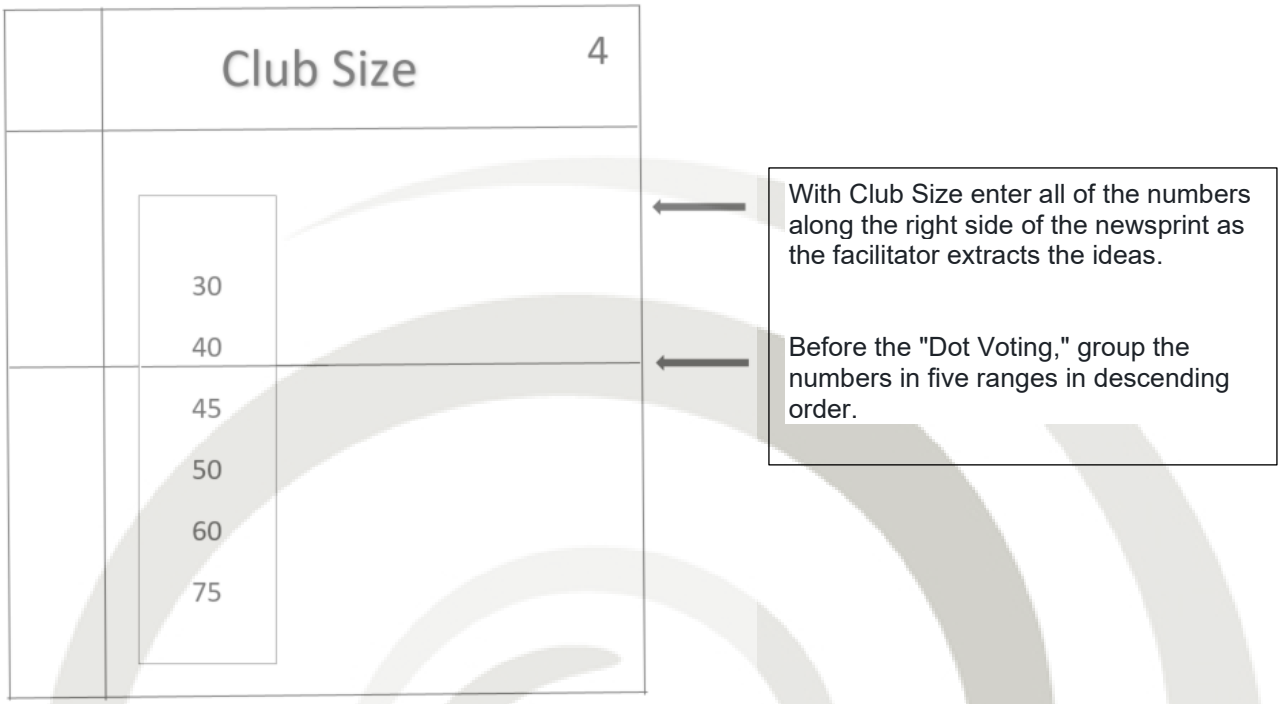

VIRTUAL: Extractor/Scribe

The Scribe is responsible for capturing the extracted ideas that the Extractor is obtaining from the participants. Scribing is done by Rotary Action Plan Category. Again, there are two or three questions for each Category of the Rotary Action Plan. The tool, however, becomes a digital version of a survey shared during the Zoom meeting via Screen Share. There is only one Scribe in a virtual delivery.

The recommended tool is SurveyMonkey, which is utilized best in a paid subscription by the District. A template can be received from IVFC and saved in the District account. Other options such as Google Forms have been utilized, yet we have found the report of the survey results is difficult to follow and SurveyMonkey has a clear chart. The Scribe should be someone ideally with SurveyMonkey experience to facilitate the setup of the survey prior to the event.

There are two rounds of voting so the Scribe will need to be proficient in quickly gathering the survey results and be able to obtain the link to place in the chat immediately after extraction and, if necessary, consolidation. The Scribe would only speak if a clarification of a headline or a change of pace is needed just like on site. The Scribe in a virtual venue should be proficient in typing skills, be proficient in copying/pasting from chat to SurveyMonkey, and have a stable internet connection with a dependable computer. Having two monitors can be useful just like in the Tech Host role. It

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is possible for the Tech Host to also serve as Scribe if very tech savvy, but a best practice is to have a separate team member as Scribe.

The most important technical requirement besides comfort with SurveyMonkey, is proficiency in screen sharing while on a Zoom session. The Scribe needs to become familiar with SurveyMonkey and know it in detail. The template from IVFC is pre-set with the number of votes per block for Round One Voting. If you would like additional resources on how to use SurveyMonkey and costs you can go to "surveymonkey.com" for pricing. The SurveyMonkey Help Center has great resources for how to design and manage the surveys.

Once the Scribe is set up to chart the ideas, the Extractor begins. Extracted ideas should be entered into the SurveyMonkey with past tense verbs. The Extractor may have to change the tense of the verbs. If this is done in the first question consistently, the participants will quickly learn to change their present tense verbs to past tense. For example, if a participant says: Build a bus shelter. The Extractor would change that to: Built a bus shelter. The Scribe would write the past tense verb in the SurveyMonkey. After a few changes of the verbs, they will start modifying their verbs to past tense. Additionally, the Extractor might reduce the idea to a "bullet point" or "headline." The Scribe just needs to focus on the task of capturing the ideas.

The Extractor will ask the participants to raise their hands and when called on to unmute to share their ideas. The Extractor will also give the participants the option to put their ideas in the chat. It is important for the chat ideas to be read. The Extractor or another facilitator who watches the chat will read the responses out loud stating the person's first name and the idea. If the present tense needs to be changed to past tense, be sure to do it as you read the chat response so the Scribe can chart appropriately. Additionally, the Extractor might reduce the idea to a "bullet point" or "headline" while reading the chat. Decide who will read the chat before the session begins. Work with each other to make that flow smoothly when reading the chat.

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VOTING

ON SITE: First Round of Dot Voting

Each participant is given a maximum number of choices for the Categories extracted. They vote based on each Category. Allow **15 minutes**.

Dots are used for voting. Voting is done by Categories not questions. The Categories and number of dots are on the chart below. Categories are separated by blue tape. The number of votes is designated in the upper left corner square by the Category name of the first newsprint sheet in each Category.

The objective of voting is to distill the ideas down to the top 3 or 4 in each Category. It usually takes 2 rounds to accomplish this: the first round distills down to 6-7 ideas and then the second round distills down to 3-4.

Distribute the blue dots for voting. Explain they will be voting with these dots for their top choices in each Category, utilizing the number of dots that are noted at the top of the first wall chart for each Category. They may place only one dot to a line. The dot will be placed to the left of the idea (where the line created a box). Stacking of 3 dots on one line (voting 3 times for one idea) is NOT allowed.

Suggest members split up with a different small group standing in front of each Category of wall charts (do not all start on the same chart). Then as the dot voting begins, the small groups will ALL move clockwise around the room to avoid forgetting which Category they have yet to place their dots. This is not the time for a person to take a break and leave the room. A break is given between the two rounds of voting.

Here are Categories and the dots required:

A. Increase our Ability to Adapt ..... (4 Dots)
B. Club size ..... (1 Dot)
C. Expand our Reach ..... (4 Dots)
D. Enhance Participant Engagement ..... (5 Dots)
E. Increase our Impact ..... (6 Dots)
F. Club Fundraiser..... (2 Dots)
G. The Rotary Foundation (and Club Foundation) ..... (2 TRF, 2 Club Foundation)

Total dots to hand out **<u>26 Dots (24 if no Club Foundation)</u>**

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ON SITE: Second Round of Dot Voting

Each participant is given a maximum number of choices for the Categories extracted. They vote based on each Category. Allow **15 minutes**.

The reason for the second round of voting is that we eliminate all ideas that received zero to a few dots on the first round. This process tends to really narrow down the focus for the future of the club resulting in the top ideas to develop into goals in the Master Plan.

Following the first round (blue dot round) of voting, the facilitation team will take their red markers and walk around the room identifying those ideas that did not receive many dots. They will X out the voting square adjoining any ideas that did not get many votes to reduce the choices to 5-7 per Category. The Dot Voting Facilitator who instructs about how to use the dots will then distribute the red dots. For the second round, instruct all participants that they can only vote on ideas that do not have an X of elimination in the box where voting would occur. The same voting procedures are used for the second round. Nothing changes, except for the fact that you cannot vote for anything that has an X in the voting square.

Note: The Categories that may not need a second round of votes are Club Size and Fundraising. This will be determined by the Dot Voting Facilitator once the first round is completed. If the dots seem to be falling into one very specific number with few dissentions, then there is no need for a second vote. If a smaller group is being facilitated, a second round may not be needed. For example, under the Foundation Category, a small group may only offer 4-5 ideas.

<u>Guiding principles proposed for the Multi-voting exercise:</u>

- Use consistent process for each group, regardless of the number of participants (this will be as valid as any other approach)
- Use the same number of dots for each Category for each of two rounds except perhaps Increase our Impact which may only need 4 dots in the second round of voting.
- Too many dots per Category will slow down the process and not improve its value. The idea is to get consensus around which are the ideas most worthy of further work when there is no one clear "best" idea.
- Use the specified number of dots for each category. This gives us enough input to do our summarizing/synthesizing based on clusters of dots, and gives the Club enough focus to begin developing the Master Plan. This dot process will accommodate groups of 10-12 or 20-25.
- The objective of the first round of voting is to bring the number of stated ideas from whatever was posted on the wall charts down to 5-7 ideas for the second round. Put an X over any ideas that will be eliminated in the second round of voting. This will limit the choices on the second round to 5-7.
- Sometimes you get consensus on the first round of voting, so that Category does not require a second round. Adjust the dot voting accordingly in the second round of voting.
- No "voter" may place more than one dot on any idea in each Category
- Have people split up and start facing one of the Categories on the wall charts. Then everyone shifts to the next Category of wall charts moving in a clockwise direction.

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VIRTUAL: First Round of Voting

Each participant is given a maximum number of choices for the Categories extracted. They vote based on each Category.

The Scribe will copy the SurveyMonkey link into the chat and ask the attendees to click on it to open that link. If done in two separate sessions (recommended), make sure everyone has the link and then prepare to close the session with clear instructions about round two voting. The second round of voting can be done as an email the next day. We recommend at least one day between sessions to allow all to vote. Each round of voting will take about 5-10 minutes electronically. It is important prior to closing Session One to explain how the second round of voting will occur. If it is via email let them know who the email will be coming from so they don't miss it. Please clarify that round one voting needs to be done immediately to allow the Scribe to prepare the second round of voting with SurveyMonkey and derive the link.

VIRTUAL: Second Round of Voting

Each participant is given a maximum number of choices for the Categories extracted. They vote based on each Category.

The reason for the second round of voting is that we eliminate all ideas that received zero to a few votes on the first round. This process tends to narrow down the focus for the future of the club resulting in the top ideas to develop into goals in the Master Plan.

You will create a full copy of the Round One Voting and rename it to Round Two Voting. Remove the Club Size Category. After attendees have voted you will go to the Round One Voting results to reduce the options for Round Two Voting. Document the consensus for "Club Size" since you will need that in the Summary/Synthesis. Utilizing the "sort descending" option in "responses," you can quickly identify the top "vote" getters. Narrow down their choices. Reduce the choices to 5-7 per Category and perhaps 8-10 in Increase our Impact.

Once you have identified the reduced questions you would go to the copied SurveyMonkey you renamed Round Two Voting and just delete the ideas just as you would make an X through the ideas on site that did not get many votes. Then copy the Round Two Voting SurveyMonkey link and email to the participants.

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SUMMARY/SYNTHESIS

The Summarizer/Synthesizer draws conclusions and summarizes/synthesizes the ideas in each category that will develop into goals in the Master Plan. Study the Summarizer/Synthesizer Role to get more insight into how to be most effective in this role. Also, read through the three points of view material and practice which viewpoint you will use. Allow **10 minutes** for this step during the Club Visioning Event.

ON SITE

Go to each of the areas, count the number of red dots by each idea. Identify the top 3 or 4 vote getters in each category. With a red marker, circle those 3 or 4 ideas. The Summarizer/Synthesizer will then give a verbal report on the top vote getters for each category.

The Summarizer/Synthesizer quickly (and with energy and passion) connects key statements from the various wall charts to show any interrelated ideas. The Synthesizer/Synthesizer also makes observations as to what seems to be "evolving" (trends or similarities) from the voting. We suggest you use the priorities of the Rotary Action Plan and add Fundraising and Foundation when giving your summary/synthesis. Some clubs begin to see a pattern, theme, or a type of club characteristic that simply "pops" out. We want them to see themselves "not as they are, but as they have become" based on this experience. A good Summarizer/Synthesizer will begin to catch on to this. This is where the excitement increases for most participants and some will offer up some "Ah ha's!" If the excitement catches on, some small groups or individuals may even start to formulate their elevator speech on the spot.

VIRTUAL

The Scribe is best suited to do this summary/synthesis since he/she was the most intimately connected to the extracted ideas and consolidation. We recommend screen sharing the SurveyMonkey results directly onto a shared screen, or if time allows, copied onto a PowerPoint slide for ease of viewing. This can be done easily if the voting is done between the first and second session.

The Summarizer/Synthesizer quickly (and with energy and passion) connects key statements from the various wall charts to show any interrelated ideas. The Summarizer/Synthesizer also makes observations as to what seems to be "evolving" (trends or similarities) out of the voting. We suggest you use the priorities of the Rotary Action Plan and add Fundraising and Foundation when giving your summary/synthesis. Some clubs begin to see a pattern, theme, or a type of club characteristic that simply "pops" out. We want them to see themselves "not as they are, but as they have become" based on this experience. A good Summarizer/Synthesizer will begin to catch on to this. This is where the excitement increases for most participants and some will offer up some "Ah ha's!" If the excitement catches on, some small groups or individuals may even start to formulate their elevator speech on the spot.

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Summarizer/Synthesizer Role

When you assume the role of Summarizer/Synthesizer, you want to perfect your ability to:

- Amalgamate key ideas
- Blend differing notions
- Combine parts into a whole

With these skills in mind, you will want to achieve a singular end: to formulate a "Statement of Purpose" supported by a series of strategic vision statements that help a club see itself "**not as it is, but as it has become**" at the end of three years.

Sequence of Actions: To achieve the future oriented end, there are a series of steps that will enable you to "capture" the future.

1. While participants are completing their second round of placing their "priority" dots and fellow facilitators are running a final tally on each "cluster," begin to survey the general areas where dots are in greater numbers. Focus on what is or you expect to be among the top three "winners" in each cluster. Ignore all areas that received "no" dots.

2. Seek associated threads and patterns by identifying common phrases, synonymous terms, or similar words. Highlight these specific terms with a marking pen. Try to complete this search among all clusters in about three minutes. Stay focused; stay on task while participants are milling about.

3. Have everyone return to their places. Get their attention. Tell them that you will try to characterize their "Identity." You will relate what you observe about their club three years out. Emphasize this interpretation is about "You and Your Club." Tell them it's "Your Future" that you will try to describe and help them "see."

4. Connect the "verbal dots" that you have studied on the wall charts. Start at the beginning by looking for "attributes" (i.e., characteristics, features, and demographics) that support and affirm priority entries in all the charted categories. Offer full sentences that express what you see as the culture, programs, projects, and membership of the club in the future.

5. Ultimately, you want to help the club "see:"
    - What is internally present among members, but not articulated.
    - What is believed, but not expressed.
    - What is common, but nor previously affirmed.

6. Compose a preliminary "Statement of Purpose." (Advisable to define by example.) For instance:
    "We provide service to others, promote integrity, and advance world understanding, goodwill, and peace through our fellowship of business, professional, and community leaders."
    "Enhancing Opportunities for Youth, Creating a Better Community for All."

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7. After you have made your observations, seek their approval. Ask: "Does that sound like you?"

8. Be sure to deliver your summary/synthesis with enthusiasm. Participants will be energized by the excitement you exhibit when you fuse together and blend harmoniously the seemingly confusing array of information on the numerous wall charts.

9. Invite other members of the facilitation team to provide their supplementary observations. Introduce their participation with the question: "What did I miss?"

SUMMARY/SYNTHESIS: Three Points of View

When conducting the Summary/Synthesis, you have three alternative points of view you can use. You should choose one as you summarize/synthesize the club's position three years in the future.

Third-Person Perspective

You may wish to describe the "new and improved" future club in the third person. This will sound like a newspaper account where you provide details as a disinterested third party.

As you address the group, your explanation of the club could sound like this:

"In three years, the club doubled the number of members. It has achieved considerable pre-eminence as a go-to organization dedicated to helping people here and abroad. On the local scene, the club has achieved new and expanded programs for youth in the community and its school system…"

Notice there is no use of pronouns like "we" or "you." Instead, it is an objective, detached, seemingly impersonal presentation of what the club has become.

While the third-person approach is a legitimate portrayal of the club, it is usually less effective than the other two approaches. It can appear distant and aloof, without an emotional connection.

Second Person or "YOU" Viewpoint

The pronoun—***You***—becomes the essential hallmark when employing the second person perspective.

Your language will be replete with references to the club members as ***"You"*** and, in the possessive, as ***"Your."*** In doing so, they will be better able to see themselves in the future.

For example, your narrative could take the form of the following:

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"In five years, you have doubled the number of members in your club. You have achieved considerable pre-eminence as a go-to organization. You are dedicated to helping people here and abroad. On the local scene, you have achieved new and expanded programs for youth in your community and your school system…"

The summary/synthesis becomes more inviting when the "you" is used frequently. People are better able to connect with the future you state.

First Person, using "WE"

The first-person approach will incorporate the pronouns ***"I'*** or ***"We"*** into the summary/synthesis. Also, the words ***"Our"*** or ***"Ours"*** will reaffirm the description.

When choosing this alternative, it is recommended you seek permission of the group to assume a role as a member. You want to interpret the future as an accepted, good faith member of the club.

Consider, then, an approach such as this:

"I like what I see on these walls. As such, would you allow me to be a member of your club as I tell you how I see OUR future?"

[Assuming you get a solid Yes, then proceed.]

"In three years, we have doubled the number of members in our club. Moreover, we have achieved considerable pre-eminence as a go-to organization. We are dedicated to helping people here and abroad. On the local scene, we have achieved new and expanded programs for our youth in our community and our school system…"

By taking on the first-person perspective, you have identified immediately with the group and they have identified with you. You have become "one of them." You're not talking at or to them, but instead, as one of them.

Once you have chosen your approach, stick with it and be consistent. In other words, when conducting the significant, concluding summary/synthesis, do not indiscriminately change among the three perspectives. Going back and forth between They-You-We perspectives will be distracting. Best to remain "in role" as you describe the club's future. Remember that you have positioned yourself "three years out" and are describing the club in that three year "here and now."

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VISION TO SUCCESS

This section shows the club how to start acting on their new Vision and introduces the concepts of a Master Plan and Action Plan to implement ideas. Allow **40 minutes**.

By setting clearly defined goals and working on an implementation plan, the club is better prepared to make their Vision a reality. Starting with the ideas the club has chosen as their top priorities, this new concept of taking the club from the Vision to Success will give a pathway to the outcome.

Tell them to remember that the goal of the Club Visioning Event is not to define the Club's goals, but to take the ideas that were prioritized, create goals, and develop a process by which the goals can be implemented to accomplish the Club's Vision.

Master Plan

Once the Summary/Synthesis has been given, the Planner shows them how to take these ideas generated by the group and develop an overall plan about how to accomplish those ideas over the next three years. The Master Plan answers the Planning Question: "Where do we want to be?" The importance of this step is critical to helping incoming leadership such as the President Elect and President Nominee see their part in the plan.

It also helps visualize that not all of the ideas that are moving forward have to be done in the first year, taking off some of the "proverbial pressure." This plan can be developed by the club leaders such as the board or a group of members who are passionate about accomplishing the three year plan. The ideas can stay ideas at first until they are developed into specific and measurable goals. That change from idea to goal can be done by the leadership group before presenting to the club or the group that is charged with creating the Action Plan.

The form shows that the ideas/goals are divided over three years. Some can be accomplished the first year, others in years two or three and still others may have components that need to be accomplished over all three years. Let me give you an example of that last one. Perhaps a goal is to build a Rotary Building. That may take all three years to accomplish.

Then the form asks who will be responsible for that particular idea or goal. Someone needs to step up so it might be the person in charge of that area. For example, if the goal is about Membership, perhaps the Membership Chair would be responsible for generating the Action Plan for accomplishing that idea or goal. The Master Plan is an overall map for the ideas that were generated at the Club Visioning Event.

Achieveable Goal

Achievable goals mean that you define what you want to have happen in measurable terms. For example, a goal could be sending two students to RYLA during the next Rotary year. Another

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example: Write a Global Grant and obtain approval during the coming Rotary year. Each of the goals are realistic, measurable and have a timeline.
Once the Master Plan is done at least with the ideas written in, then the President and a group who were present at the Club Visioning will share the results with the club members in a PowerPoint at one of the club meetings. It is important that a group who experienced the Club Visioning Event share the messaging, so the club understands this is not one person's plan or agenda. A PowerPoint template is available for the District Visioning Chair to download from the IVFC website so you need to tell the President that a PowerPoint template will be provided so the club does not need to create it. At the end of the meeting in which the group shares the Club Vision, the President will ask for a consensus that what they have heard will be the plan for the next three years. This is extremely important for creating continuity within the club. The next step is to develop an Action Plan for each of the ideas/goals on the Master Plan.

Action Plan

The Planner then shows the Action Plan form and an example of it. Action Plans answer the question: "Who will do what by when?" It defines the tasks you must accomplish in order to achieve the goal. On the Action Plan form it asks for the goal, so the idea needs to be changed to a specific, measurable, time limited goal if it has not been done so already. That goal will be entered into the first line which says: Goal. Under that on the form, there are seven areas that need to be considered. Those areas are: task to be done, who will lead getting that task done, who will help, what resources might be needed, when you will start, when you predict you might finish, and any status report.

Let's do an example. The first column is a list of all the steps that need to be done if the goal is to be accomplished. So let's say the goal is: Send two students to RYLA in each Rotary year for the next three years. What has to happen in order to begin the process of accomplishing that goal?

What tasks need to be done? For instance, if the Youth Services Chair is assigned to that goal, perhaps he/she will need to attend the next board meeting to ask for funds to pay for the RYLA fees and for the board to appoint someone to be the RYLA chair.

The next question is: Who else might help? Perhaps there is a member who wants to be involved with youth that might go to the board with the Youth Services Chair so he/she can volunteer to be the RYLA Chair.

What resources might be needed for this task? Before the board meeting, the Youth Services Chair might need to look up the fee for RYLA and the Youth Protection Policy as the board might want to know that data in order to make an informed decision.

Additionally, the Action Plan asks when the group might start the goal and when does the group predict they will be finished so the goal can be time limited. There is one more space for monitoring progress with comments and status reports.

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That is just one task. A goal may have twenty-five tasks that need to be accomplished before the goal is attained. This part of the Action Plan answers the Planning Question: "How will we get there?"

And speaking of attainment. At the bottom of the Action Plan, there is a box that asks the group to predict the outcome. This answers the last Planning Question: "How will we know we have arrived?"

ACTION PLAN PRACTICE

Once the Planner has explained both the Master Plan and the Action Plan to the participants at the Club Visioning Event, then the Planner gives them time to practice developing an Action Plan. To have them practice you will use either the breakout rooms in the virtual venue or breaking the group into units of three in an onsite venue.

ON SITE: Action Plan Practice

Say something like: "Now we are going to give you the opportunity to practice creating an Action Plan. I have chosen one of your top ideas and have created an achievable goal for you to use." Already have a goal created so you don't have to do it on the fly.

Then you say: "Here is an Action Plan document for you to use." Pass out a blank Action Plan. Continue by saying: "I will divide you into groups and I want you to make an Action Plan for the goal I will tell you once you have gotten into your groups." Put them into groups of three by saying: "You three are a group, you three are a group, etc." Or you can choose to diversify the groups by numbering them into small groups so as to break up their cliques and spread out any challenging participants.

Then say: "As you get into your groups, please choose a reporter." Then read the goal to them. For example, a goal might be: We will gain eight new members by June 30. Give them 15 minutes to generate an Action Plan for that goal. Once the 15 minutes are up, then have several of them read their Action Plan tasks. Help them by giving them feedback on the contents of their Action Plan. Most of the time, you will need to coach them to be much more specific with each task.

VIRTUAL: Action Plan Practice

The Facilitation Team will assign the participants to the breakout rooms which the Tech Host will create prior to session two. You would say something like: "Now we are going to give you the opportunity to practice creating an Action Plan. I have chosen one of your top ideas and have created an achievable goal for you to use." Again, already have one created so you don't have to do it on the fly. For example, a goal might be: We will gain eight new members by June 30.

Add: "You will automatically be sent to the breakout rooms for 15 minutes. You will use the Action Plan form that was emailed to you or grab the one our Tech Host has put in the chat box to download to your computer right now. Please use the Action Plan form and create an Action Plan

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for the goal I will give you in a moment. Choose a reporter to share your Action Plans when you return to the main room. Here is the goal:" then state the achievable goal.

Before sending them to the breakout rooms, always ask: "Are there any questions?" Answer any questions. Then state: "Please send everyone to the breakout rooms." The Tech Host will send them automatically to the breakout room and bring them back after 15 minutes with a one minute warning.

When they come back, be in gallery view. Then say: "Reporters for each group, please raise your hand in either the participants or reactions function and I will call on you to unmute and share your Action Plan for the goal you were assigned." You do that so everyone is not talking at once. Call on as many groups as time permits.

After practice, we set them up for success by having them volunteer for tasks to accomplish the process of developing the Master Plan and Action Plans to go with each goal on the Master Plan. The Scribe writes on an electronic document if virtual or on the newsprint if in person as the Planner asks for volunteers for the next steps to take them from their Vision to Success.

VISION TO SUCCESS: Assignments

The Planner asks for volunteers to fulfill six steps. They are:

1. Gather ideas to choose which the club will work on over the next three years
2. Create a Club Statement of Purpose or Motto
3. Establish a Process for development of the Master Plan
4. Share Club Visioning results with the club
5. Choose a Club Impact Leader or Club Impact Team
6. Create an Action Plan for each goal in the Master Plan

You would say something like this: "Let's see who is going to help with the next steps which we call Vision to Success."

ON SITE: Vision to Success Step 1

A Scribe writes on newsprint all the six action steps, who will participate in each, and the date the actions will be accomplished.

Action 1. Ask for someone to compile the wall charts, record all of the information, then choose the top three or four ideas which become the basis of your Master Plan. Tell them there is an excel template that will sent to that person to compile the ideas. Say: "Who would be willing to take the wall charts?" Get someone to volunteer. Then you ask: "By when will you have them compiled on the excel spread sheet?"

The compilation of the many ideas during the Club Visioning Event should be done rather quickly while the ideas are fresh in everyone's mind. With the spreadsheet templates provided, an individual will find it easy to transfer so should be done within days.

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VIRTUAL: Vision to Success Step 1

Action 1. The Scribe will be using Screen Share with an MSWord document for participants to see as the participants volunteer. This template can be found on the IVFC website.

Action 1. You say something like: "Your top ideas in each area become the basis of your Master Plan. Who will get the list of ideas compiled by the scribe?" Get someone to volunteer. Then say: "We will send those to you as soon as possible."

If done virtual, the Survey Monkey can be sent the next day.

BOTH: Vision to Success – Steps 2-6

Action 2. Next tell them you will create YOUR club's Statement of Purpose, motto, tagline, slogan or whatever feels right to them. This is important so that club members can quickly and passionately tell people who and what their Rotary club is. Often this comes from the questions about: "What does your club stand for?" and "What are your Club Attributes." Typically, this is done with a committee of about 3-5 that brings a recommendation back to the club as to what the motto will be. "Who would be willing to lead this committee to formulate a motto, Statement of Purpose, slogan, or tagline? Get a volunteer. Then say: "Who will help _____ with this?" Get a diversity of members to volunteer. Best to get 4-5 volunteers. Then ask: "When will you meet for the first time?"

The creation of a Statement of Purpose ("elevator speech", slogan, motto, or vision statement) is very close to the establishment of a club mission. It basically explains why the club is in existence today, what the club stands for in their community, and shares the unique "personality" the club represents. If it does not fit the personality of that particular club, it will offer less meaning to the members. Overall, it becomes the new rallying point around which this club can make decisions, recruit, and offer services. Let them know that because of the enthusiasm that came out of the vision consensus process, this creation of a mission statement must be done within the next 2-3 weeks and by individuals who experienced the session's excitement.

Action 3. Say: "You will need to decide how to develop a process for generating the Master Plan using each of the top ideas. This is different for every club, but certainly can be done with your board or existing committees and/or those of you here at the Club Visioning. Who wants to be on the committee to generate the process by which the Master Plan will be developed?" Get 4-5 volunteers. Then ask: "When will you have that process generated?"

Action 4. Say: "Now you need to engage the club in what has happened in order to get a collaborative commitment. Likely they will have heard about the Club Visioning Event and will be excited to hear the results. Remember that you came to this event as a group, so this presentation should be done as a group. If a number of you are sharing, this will help engage the rest of the club. We have a PowerPoint template for you to use to describe what Club Visioning is all about and the

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results of the Club Visioning. Who wants to help your President present to the club?" Get 3-5 volunteers. Then say: "President _____, when would be a good time to share the results of the Club Visioning with your club?" Perhaps at the Club Assembly or sometime within the next 4-6 weeks.

Scheduling a club assembly or forum may be a new concept for some clubs. It is important to take the time to explain why this is an important action a club should undertake. Ideas that are not written down simply remain ideas (and dreams). Once ideas are documented, it is easier to remember and easier to communicate to others.

Once communicated and explained to others, it is easier to gain understanding and buy-in. And once a club gets buy-in, the club gains consistency, continuity, and an extended consensus. At the grass roots level, written "intent" pushes accountability. It is hard for a club to publicize something they never intended to follow through. With this in mind, a catalyst for pushing this forward is to create an event (with a set date) where the vision and actions can be shared with the rest of the club, proudly, with enthusiasm, and with style! We have found that if this is not done within 4-6 weeks from the Club Visioning Event, the excitement dies down and the daily tasks of current reality take over.

Action 5. Say: "Would one person or a group of you be willing to be the Impact Leader or Club Impact Team?" Reassure them that it is not DOING everything, but making sure the club keeps moving forward with this vital work? Get one volunteer or a group of volunteers. Then say: "Of course, the Impact Leader or Impact Team's job will be for the next three years on a continual basis to help keep the plan alive and vibrant."

Effective implementation of the Club Vision Plan requires consensus (which is accomplished at the Club Visioning Event). An Impact Leader or Impact Team ensures that progress is made, and the actions incorporated into the workings of the club. The role of this Impact Leader or Impact Team is to ensure the vision created at the session is in the forefront (top of mind awareness) as club leadership discusses annual goals and tactical projects throughout the year. While all club members are responsible for creating and helping to execute the actions and represent the new slogan, the Impact Leader or Impact Team is the chief advocate of the Club Vision Plan to make sure progress is tracked, documented, and that the plans are actually being implemented. The tasks of this role are to document any changes, make updates, and communicate with the Assistant Governor and District Visioning Chair for further communication. If the club determines that a committee or committees will develop the Action Plans, the Impact Leader or Impact Team will communicate directly with the committee or committees to help support their efforts.

Action 6. Say: "You have a Master Plan with goals to accomplish over the next three years. Now you need to have a process by which the Action Plan for each of those goals will be created? We encourage you to give this task to your committees after presenting the results. When a committee generates its own plan, it is more likely to follow through with the plan. A Vision to Success Guide will be sent to your President to help with developing your Master Plan and Action Plans as well as sharing great hints about how to enhance your plan's success. After everything is developed, be sure to send the Master Plan to your Assistant Governor and your District Governor so they can support you in your process of achievement."

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Help them establish a time for those Action Plans to be given to the President. It is not necessary to write in who will generate the Action Plans. Just suggest that be the committees. For example: Club size can be given to the Membership Chair to develop the goal and Action Plan.

Below is a sample of what the Vision to Success Chart might look like:

ON SITE:

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

VIRTUAL

ACTION	WHO	WHEN (Specific Date)
1. *Gather the list of ideas from Survey Monkey*	*Lead or Scribe sends to the President or Club Visioning Coordinator*	*Next day*
2. *Create a Statement of Purpose, vision statement, motto, or "elevator speech" for the club*	*Mike, Jenny and Sue* (3 or more mixed gender with one as chair)	*3 weeks (in preparation for our club assembly)*
3. *Establish a process and develop the Master Plan*	*President , President Elect, 1 or 2 others who participated in event*	*2-3 weeks to have Master Plan done*
4. *Share Club Visioning results with the club*	*President Steve with 3-4 others from event*	*Upcoming Quarterly Club Assembly or Forum in 5 weeks or minimum of within 6 weeks*
5. *Choose a Club Impact Leader or Club Impact Team*	*Well respected enthusiastic & experienced Rotarians*	*Leads the ongoing implementation*
6. *Create an Action Plan for each idea in the Master Plan*	*To be assigned to committee chairs and others*	*Action Plans returned to Pres by: (suggest 4-6 weeks if they don't answer)*

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CLOSING REMARKS

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. Allow **10 minutes**.

Any of these statements/explanations can be used by a facilitator when closing the session. Choose any that apply to the club.

"This (name) Rotary Club team has accomplished a tremendous amount during this Club Visioning Event. You have brainstormed and reached consensus on a set of priorities for the next three years." Tell them the following:

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 goal attainment
- A way to help ensure continuity and consistency of focus and action over the next three years
- A recruiting tool. When all members can passionately and succinctly state what the club stands for and where it is going, recruiting becomes simply sharing the opportunity to participate
    - A press release should be issued to the community. Now that this club has seen a vision, there is a good chance that others within the community would like to be a part of this vision

Perhaps say as closure: "As we close this session, let me ask you two questions:"

- What doubts, worries, concerns, or reservations do you have about this discussion of strategy? [Listen to responses]
- What excites or energizes you most about what you accomplished in this Club Visioning Event? [Listen and affirm responses]

"When you look at all of the activities that have been posted around the room, remember that not all will be accomplished in one year. For instance, (pick a topic) ...year 1 may be researching what others in the community are doing in this area, year 2 may be working with a partner to accomplish the need, with a plan to start in year 3."

"Rotary clubs doing work in all four priorities of the Rotary Action Plan are well balanced clubs. For instance, if you are only doing community service, then you may well be similar to any service organization here in this area. A strong Rotary club is not only active locally, but is active in other parts of the world, and is active in bringing the world to this community."

"When you have a plan, it should make it easier for members to step into roles of leadership. Once they are aware that they do not have to figure out what they will do in their year in leadership, but are the steward of a long range plan, it should make it more enticing to volunteer for leadership roles."

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"Once you have had some time to work on your Master Plan and set goals, I strongly suggest that you issue a press release. The press release would tell the community that the Rotary club has come together and will be working in the following areas over the next three years. Chances are good that there are people in the community that have interest in those areas and might be looking for an opportunity to work with or join a group with the same vision."

"We are often asked: 'How do we compare to other clubs?' Of course, there are some commonalities between clubs, but it is always exciting to see the ideas generated because they reflect the culture of this club, and the culture in other clubs may be very different."

"You have put up many great projects on the wall tonight. This absolutely ties back into your membership goal as you will need many people to accomplish these goals."

"Congratulations on choosing to attend tonight. In doing so, you have chosen to help ensure a stronger Rotary club here in this community. When you chose to help strengthen your Rotary club, you also chose to have an impact on the future of this community. And so, I applaud your efforts to make a difference for the community of _____."

"Your President will be receiving a Vision to Success Guide that the club can use as a resource to help guide you through your steps to implementation of your ideas."

To engender enthusiasm at the very end, you can choose to have each person if in person go around the room or if virtual have them put in the chat: the one thing they will take away with them as they leave the Club Visioning Event. If virtual, read the chat stating the person's first name and what was written. What you will find is that there is a renewed energy within the group to make their club even better.

EVALUATION

Ask the participants to fill out an evaluation. The evaluations are used for your debrief.

ON SITE:
You give them the evaluation form and have them fill it out immediately.

VIRTUAL:
You will have a poll with four questions to read to them to respond to or you can choose to send a SurveyMonkey out at a later time. So you would say something like: "We would like to do a Poll to get some feedback from you. There are four questions. Please chose an answer for the first question and then submit. Then do the same for the other three questions." Read each poll question and the choices to keep from having dead space on the virtual venue. If you do a SurveyMonkey, just tell them one will be sent. With the SurveyMonkey, you risk not getting responses whereas with the poll, you can capture the results and get feedback instantly to use at your team debrief.

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AFTER THE SESSION

DEBRIEF

The Lead will conduct a Debrief after each Club Visioning Event. Allow **15 minutes**

After the Club Visioning Event, whether virtual or in person, the team does a debriefing in which the team shares what was successful about their performance at the event and what as a team they need to improve on. It is important to do this after each event to keep refining your team's skills especially if you have new District Visioning Facilitators who are less experienced and need to learn the techniques.

Overview: In an effort to purposely perfect the Visioning process, it is imperative to conduct an immediate post-session debriefing.

Three questions will center the critical discussion:

1. What went well?
2. What would we do differently to be better?
3. What did we miss?

Time for Recall. When posing the first question, allow members to celebrate the event. Encourage each team member to list and describe everything that went well in the session; from things minor to major. Encourage responses from everyone. Let the team be exhaustive in the telling. You might want to cover the following:

Adherence to Cheat Sheet
Defined Roles; Lead, Presenter, Scribe, Extractor, Planner, Tech Host
Tech Applications
PowerPoint Presentations
Summary/Synthesis
Master Plan & Action Plan
Action Plan Practice
Computer Equipment

Then invite team members to identify what could be enhanced or corrected. When things go well, those tasks are happily identified. When there is a programming shortcoming, it might require additional encouragement to acknowledge and correct. It might take a bit of nudging on the part of the Lead. Explain that: "No matter how well prepared or how flawless was a rehearsal, a 'glitch' is inevitable. Just know it's expected." Any unintended faults or unexpected errors become a teachable moment. Most of all, let the team know that the participants do not know what should have happened so anything the team did that was a mistake was probably not noticed.
Be sure to add asking about things that may have been omitted. You might say: "We have talked about what we have experienced, focusing on what we said or did. Are there gaps of what was not

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said or done? What was inadvertently omitted? What was left out? What could we add to avoid any future lapse?"

The notes of the event taken by the Lead and sent to the District Visioning Chair are a learning guide that team members can read and re-read as they prepare for subsequent training events. The Summary also enables the District Visioning Chair and District Visioning Coordinator to recognize strengths and areas for development for District Visioning Facilitators.

The Lead will continue to build the Summary with a list of all the suggestions. Then, close out the Debrief in your own words. Applaud the team's commitment and willingness to be leaders in the Club Visioning process. Let sincerity and praise be your guide. Acknowledge the Service Above Self contributions teammates are making to enable clubs "to see themselves, not as they are, but as they can become."

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DOCUMENTS TO BE SENT

The District Visioning Coordinator/Lead sends documents the next day to the President.

Once the Club Visioning Event is over, the District Visioning Coordinator/Lead will send the Club Visioning Coordinator or President the following documents:

1. If virtual, the document on which the Scribe wrote the brainstormed **ideas** with the designated top three or four. If on site, the excel template to record the ideas.
2. The **PowerPoint template** to be used at the club meeting in which the group shares the results of the Club Visioning Event.
3. The **Vision to Success Guide** that helps the group understand the process of taking the ideas to implementation so the goals can be achieved.
4. The forms they will need to fill out; **Master Plan** form and **Action Plan** form.

Remember all the referenced documents should be downloaded from the IVFC website by your District Visioning Chair and provided to your District Visioning Facilitation team. The District Visioning Chair is currently the only one who needs a password to the IVFC website to be able to download.

Additionally, the District Visioning Coordinator, Lead, or the District Visioning Chair will check back with the club after a time to see how they are progressing. If additional help is needed, the District Visioning Coordinator, Lead, or a designee from the team will contact the club to provide the help needed.

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ON SITE FACILITATION TIPS

If you are doing a Club Visioning on site, the following information will be helpful to your team.

During The Session

The following guidelines are adapted from The Facilitator's Fieldbook by Thomas Justice and David W. Jamieson. This is a great checklist to review before each session begins.

- Smile and greet participants as they enter the space.
- Summarize key points before moving on to a new subject.
- Be aware of time; however do not repeatedly check your watch.
- Listen intently. Be a role model for listening, often paraphrasing and "mirroring" what was said.
- Maintain good eye contact and stay connected to the group and each of its members.
- Use people's names. (Tent cards with names in large letters are used at the Club Visioning)
- Acknowledge and respect diverse views.
- Protect each and every idea offered. Do not allow ideas to be attacked.
- Keep track of who talks and who does not, encouraging balanced participation.
- Organize, connect, and summarize to achieve closure and a sense of completion.
- Keep track of unanswered questions throughout the session and brainstorm available resources that might help answer them

Facilitator Responsibilities

Additionally, it is your responsibility to foster a sense of understanding and inclusion. Follow these guidelines and encourage the participants to do the same. This information is taken from the Rotary International Assembly Facilitator Handbook.

- Speak slowly and clearly
- Avoid colloquialisms
- Avoid sentences or questions with negatives (For example, instead of saying: "You have not had your meeting yet today, have you?" Say instead: "Have you had your meeting today?"
- Re-phrase if your comments are not understood
- Provide specific examples
- Avoid interrupting
- Avoid jokes
- Be aware of gender sensitivity

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Body Language/Voice

When you are facilitating, how you use your body and voice during conversation becomes just as important as the questions you ask. Consider the following aspects of nonverbal communication. This information is taken from the Rotary International Assembly Facilitator Handbook.

- **Voice Quality**: Tone, inflection, pace, and volume affect the meaning of the words you use. If you're excited, nervous, or unengaged, your voice can convey this.
- **Facial Expressions**: Your face may express disagreement, confusion, interest, or concern.
- **Gestures**: Lively, animated gestures can capture participants' attention, make the material more interesting, and facilitate learning. Nodding reinforces what participants are saying and indicates that you are listening but does not always imply agreement. Remember that gestures may have a different connotation in different cultures so try to be respectful and considerate.
- **Silence**: At the beginning of a session, silence may be an effective way of conveying that it's time to start. Being silent after asking a question lets participants think about their response.
- **Eye Contact**: Eye contact can regulate the flow of communication and control who speaks. It also affects how you're perceived by participants. The use of eye contact varies from culture to culture.

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VIRTUAL FACILITATION TIPS

If you are doing a Club Visioning on a virtual venue, the following information will be helpful to your team.

Before the Session

Equipment:
Having effective equipment on a virtual training is paramount to your success as a facilitator. You cannot do a good job if you don't have the correct equipment or if you are worrying about your equipment operating appropriately. Be sure to downloaded Zoom on your device. It is best to use a Desktop computer or a Laptop computer. An iPad is adequate, but not optimal for all roles except Scribe and Tech Host. You need to use a computer if you are assigned one of those two rolls. Definitely not a tablet or phone for being a facilitator.

Also check to see if your device can support virtual backgrounds. The reason we want your device to support them is that IVFC will have a virtual background for you to use so you can be designated as the facilitator for the Visioning event. It indicates you are in charge.

Next, if you are going to use a head set, be sure the participants can hear you and you are able to hear the participants. Be sure to do this check with someone before you go to the Visioning event. Then test it again when you enter the Zoom event for the sound/video check.

Ask yourself: Does my device have consistent access to Wi-Fi? If it does not, then you may want to find a different place to be when you facilitate as good internet service is essential to keeping you online. When you are facilitating, choose an area of your home or office where your Wi-Fi signal is most reliable. Close all non-essential browser windows and software on your computer or device so your bandwidth is used for your Zoom platform. Sometimes having a direct connection between your computer and your modem or mobile access unit, will help you have better Wi-Fi connection such as a LAN line which looks like a large telephone connector.

Disable the Wi-Fi connection on other devices to optimize your bandwidth. Your Tech Host will run any videos and do any screen sharing of PowerPoints so do not worry about taking bandwidth for those purposes. Set your other devices to Do Not Disturb so that your session is not interrupted by text message or e-mail notifications.

It is helpful if you use more than one monitor; however, it is not essential. If you use a second monitor, keep your Zoom Platform with the webcam and Session Plan/PowerPoint on one monitor and your documents on the second monitor.

Zoom Features
Learn how to use all the major functions of the online meeting software on Zoom: camera, microphone, chat, polls, reactions, raise hand, lower hand, etc. If you do not, please begin to practice and learn these major functions.

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Appearance
Look professional. It is tempting to just throw on anything because it is only a Zoom event; however, it is a matter of respect for your participants that you dress professionally. Try to wear colors that will not clash with the IVFC virtual background. Business casual or Rotary logo wear that looks professional would be appropriate. Just look well-groomed and professional.

Sit a good distance from the camera. Participants should be able to see your face, shoulders and some of your chest. When presenting virtually, it is best to be sitting, but for those who have a desk that pops up and allows you to stand, be sure the participants can see your face, shoulders and some of your chest.

Lighting is important. There should be more light in front of you than behind you. If you appear dark, move to a place where it is well-lit or get a lamp to shine on the front of you. If you appear darker on one side than the other, put a light on the floor of the darker side and aim the light at that side of your face.

Then for those of you who want to use the "touch up my appearance" feature, it creates a soft look when you use the webcam. On the Zoom platform, find the Stop Video feature which looks like a Video camera. There is a little carrot beside it that looks like this (^). Click on the carrot. Click on Video Settings. Under **My Video**, second box down is "Touch up my appearance." Adjust the sliding bar to touch up as much as you want.

Reduce Distractions
During the Visioning event, you need to reduce any distractions. If you have a pet, put the pet in another room. If you have a spouse, let him or her know when you will be facilitating so you are not disturbed. If you have children, be sure they have someone to watch them in another room or elsewhere when you are facilitating. Also, reduce any background noise so turn your television, music, and notifications on your devises off.

Materials
Print any documents you need such as the Writing Exercise, Master Plan or Action Plan or have them open on your computer. Remember, you can hear the rustle of paper so if you can use a second monitor for your documents that would be ideal. If you need to print them, then be aware of paper rustling. Be sure to check that at tech rehearsal.

Getting Comfortable
Pour yourself a glass of water and use the facilities before you logon as you will not be able to leave the session once it starts. Be sure your chair has a good cushion so you won't be wiggling around trying to get comfortable.

Identifying Yourself on the Zoom platform
Edit your name on your Zoom platform so that you have your first and last name and the word: Facilitator. Example: Joe Smith Facilitator. Set up the virtual background that IVFC has given you electronically. This designates you as the facilitator.

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Pre-check
Finally, login 30 minutes before each Visioning event for sound/video check with your Tech Host.

During the Session

Set Up
Once on the Zoom platform, turn on your camera and sound. Check how you look in the square. Be sure you have space on each side of you and a space above your head with your face, shoulders, and some of your chest showing. Check your lighting to be sure your face is lit on both sides. Check to be sure your virtual background is the IVFC virtual background. Have a copy of your virtual background saved to your desktop so if you lose it, it will be easy to retrieve. Be sure you disconnect all your other devices from your Wi-Fi. Your Tech Host will have you do a sound check. Remember to keep your video on. Mute yourself when you are not speaking and be sure to unmute when it is your turn to facilitate. Put the word "UNMUTE" at the beginning of where you are to facilitate in each section, so you don't forget.

Setting the Stage
Remember what you do at the very beginning will set the stage for how the rest of the session will function. So, several things.

1. Ask the Tech Host to let the participants in five minutes before the start time
2. The Tech Host will ask them to rename themselves and show them how to rename
3. As the facilitators when the participants start coming in, welcome them
4. Set your view to gallery view (49 on each screen). This can be set in Settings on Zoom.
5. Open the chat box pane to see any communication by the participants
6. Begin on time. Lead tells the Tech Host when it is time to get started.

Tech Overview
The Tech Host will go over the Rules of the Zoom. During this time, the participants will practice using the Zoom features to ensure optimum participation and learning. Then the Tech Host will introduce the Club President or Club Visioning Coordinator to conduct the welcome.

Speaking
When you are facilitating, be sure you look into the camera while both speaking and listening to show you are actively engaged. Project your voice and enunciate your words so that you are easily understood. Speak slowly so everyone can understand and hear you. Maintain a strong volume throughout the session. Read your script with enthusiasm and energy. Monitor your verbal reactions such as your tone to what the participants may say when they are requested to respond.

Non-verbal Communication/Body Language
Be aware of your facial expressions, posture, and gestures to be sure they are all friendly and positive. Make really good eye contact which means you need to look into the camera on your device to establish the perception of giving eye contact to your participants. Ninety-three percent of communication is non-verbal. Words are only: 7%. Tone of Voice: 38%. Body Language: 55%.
So be very aware of your non-verbal communication.

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Be Engaging
Smile!!! Exhibit positive energy and enthusiasm to set the tone. When you are having fun and enjoying the experience, it is contagious to your participants. The Scribe when presenting the Summary/Synthesis will especially need to exhibit lots of energy and enthusiasm.

Practice
Practice, practice, and practice some more. You need to be very familiar with the content of the Visioning process. You put the enthusiasm in and the energy. So read over the PowerPoint or Planner script at least six times so you flow fluidly through the content. Better yet, go to your Zoom account (if you do not have one, you can get a free one), start a meeting, practice on the Zoom venue and record yourself so you can see what you look like as a facilitator.

Responses in the chat
During Extraction, the Extractor will ask participants to put their ideas in the chat. Either the Extractor or an assigned facilitator will be reading the ideas in the chat. When you read the response, you need to state the person's first name and then the response. For example: Sally says xyz. Sam says: abc. This gives the person recognition for his or her idea or thought. It also let's everyone else hear the idea so when it comes time to vote, they have heard the idea.

Ending
Start on time, stay on time, and end on time. Thank the participants for attending. Give them instructions on what to do until the second session. If voting is to be done before the second session, the Scribe will explain exactly what will happen.

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HOW TO PRACTICE WITH YOUR TEAM

Included below are ways to practice each step of the Club Visioning process with your Club Visioning Facilitator Team.

Practicing with your Team

The following are suggestions of how to practice with your team for additional training.

PRESENTATION OF THE POWERPOINT

- Practice presenting the power point several times.
- Consider doing it out loud in front of a mirror for on site.
- For virtual, get a free Zoom account and record your presentation so you can see how you look.
- Get comfortable with rhythm, timing, transitioning from slide to slide, giving good directions, and making good eye contact with your participants or the camera.
- Bring a small group of facilitators together and present to them either in person or on Zoom.

EXTRACTION TO SURVEYMONKEY

- Have a group of Rotarians complete the writing exercise and participate in a session where you extract and scribe their answers either in person or on the virtual venue.
- One facilitator extract while the other charts on SurveyMonkey or newsprint.

As Extractor:

- Whether in person or virtual, use the facilitation tips in this guide.
- Learning how to stack the respondents by saying their names in order.
- Practice how to instruct them to raise their hands.
- Practice making long statements into headlines or bullet points.
- Keep the pace smooth so the Scribe(s) can get all the ideas recorded.

As Scribe:

- Practice capturing the headlines or bullet points extracted.
- If in person, practice numbering the pages/putting Category headings at the top of the newsprint/making the vertical and horizontal lines.
- If virtual, use the IVFC SurveyMonkey Template to record the ideas.
- If virtual, practice inserting the ideas into Survey Monkey.
- If virtual, practice copying and pasting from chat.

CONSOLIDATION AND VOTING INSTRUCTIONS

- Whether in person or virtual, use a SurveyMonkey of extracted ideas from a previous Club Visioning.
- If in person, fill newsprint with ideas ahead of time for the participants to use the dots on.
- Gather a group of facilitators.
- Do any consolidation of ideas needed before voting.
- Give specific voting instructions for both Round 1 and Round 2 Voting.
- If in person, facilitators practice crossing out the ideas that will not be voted on next round.

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- If virtual, generate the Round 1 SurveyMonkey link, allow them to vote, practice deleting the ideas that did not get many votes, generate the Round 2 SurveyMonkey link, and have them vote again.

SUMMARY/SYNTHESIS

- Get a set of "second vote" ideas from a previous Club Visioning.
- Gather a group of facilitators.
- Practice making quick notes to guide you through the summary/synthesis.
- Bring a small group of facilitators together, present the summary/synthesis to them, tying various areas together.
- Practice using different points of view to see which fits your style of delivery.
- Practice pace of delivery.
- Practice engaging with the participants.
- Practice eye contact with the participants whether in person or virtual.

PRESENTATION OF MASTER PLAN

- Practice presenting the Master Plan concept with a group of volunteers watching so they can give you feedback.
- Practice being clear, passionate, and enthusiastic in explaining how to develop the Master Plan, including WHY the Master Plan is integral to their success.

PRESENTATION OF ACTION PLAN

- Practice presenting the Action Plan concept with a group of volunteers watching so they can give you feedback.
- Practice being clear on all seven areas that must be filled out on the Action Plan, including the Outcome at the bottom of the page.

PRESENTATION OF ACTION PLAN PRACTICE

- Get a group of facilitators together and break them into teams of three.
- Give them an idea that has come out of a Club Visioning.
- Have them take the idea, turn it into a goal, and fill out an Action Plan in 15 minutes; including the Outcome at the bottom.
- If in person, have them divide into groups of 3.
- If virtual, send them to the breakout rooms with 3-4 in each room.
- Have several people share with the group the Action Plan they developed.
- Coach them as they share to make sure they are including steps that have WHO WILL DO WHAT BY WHEN and other steps on the Action Plan worksheet.
- Be sure to ask them about the Outcome they developed.

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VISION TO SUCCESS ASSIGNMENTS

- Get a group together in person or virtually and practice how you will deliver the six assignments steps.
- The Planner will ask for the volunteers for the six steps
- The Scribe will chart the volunteers either on newsprint in person or on an MSWord template from the IVFC website.
- Use the cheat sheet or have a copy of the six steps with you with suggested timelines to help the process flow smoothly.
- Practice being clear, passionate, and enthusiastic in asking questions and sharing possible timelines.

AFTER EACH PRACTICE

Do a debrief that includes asking the following questions:

1. What went well?
2. What needs to be improved?
3. What did we miss?
4. What else might be included?
5. Would watching the videos again improve your techniques?

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