



Club Visioning Learning Guide

Table of Contents

Facilitator Learning Options	2
What is Club Visioning and the Visioning process	3
Facilitation Team Roles.....	4
1) LEAD	4
2) PRESENTER.....	4
3) EXTRACTOR	5
4) SCRIBE.....	5
5) SUMMARIZER.....	5
6) PLANNER.....	6
7) TECHNICAL HOST	6
Putting it all Together	6

Facilitator Learning Options

IVFC offers several options for new and current facilitators to learn the Club Visioning process and the facilitator roles:

1. Onsite for Onsite Club Visioning (8 hrs onsite with minimum 12 participants)
2. Online for Onsite Club Visioning (five 2 hrs online sessions with minimum 12 participants)
3. Online for Virtual Club Visioning (five 2 hrs online sessions with minimum 12 participants)
4. Online for International Club Visioning (culture customized five 2 hrs online sessions with minimum 12 participants)
5. Guided Facilitator Learning with District Vision Chair (6+ hrs with reading and review with District Vision Chair)

All five facilitator learning options use the same base learning materials and facilitator demonstration videos. More information about the first four facilitator learning options is available from your IVFC Zone Vision Coordinator or you can make a request on the rvisionfacilitation.org website.

This guide covers the fifth facilitator learning option- Guided Facilitator Learning. This learning option is designed for you to learn the basic Club Visioning process and facilitator roles working with your District Vision Chair or a knowledgeable Club Visioning facilitator as a coach. This Guide is used in conjunction with the Facilitator Learning Workbook (referred to as “workbook”) and the IVFC Learning Facilitator demonstration videos to cover Club Visioning. You read the materials, ask your coach any questions, and then practice the learning materials before conducting a facilitator role. You will see LEARNING ASSIGNMENTS to promote your learning. Your facilitator coach is available for questions and works with you to practice and conduct the role.

The District Vision Chair will provide you with a copy of the Facilitator Learning Workbook to use during your learning. The facilitator demonstration videos show facilitators in action and are available on the [IVFC YouTube Channel](#) . As you go through facilitation learning, and eventually Club Visioning events, take notes on what you absorb in the Workbook. You will gain skills from practicing facilitator roles, from your Visioning experiences, and from other facilitators who share ideas they have experienced. Additional Facilitation resources and information about Rotary’s Action Plan can be found in the Learning Center at [MyRotary](#).

Let’s get started with ***What is Club Visioning and the Visioning process!***

What is Club Visioning and the Visioning process

Club Visioning is a volunteer based initiative to assist a Rotary Club with planning for its future using a proven Visioning process delivered by district level Visioning facilitators in a team approach. Results of a Club Visioning include developing a consensus of goals for a multi-year Club Master Plan and learnings on how to create Action Plans to implement the ideas. The benefits of Club Visioning are that Club members have a voice in the Club's direction and that a planning framework is created to develop goals and Action Plans.

The Club Visioning process provides a structured path to develop a Club Vision through either one 4 hour on-site event, or two 2 hour virtual events. A Club Vision includes what the Club is known for in the community, Club characteristics, community projects, international projects, fundraisers, support for The Rotary Foundation and promotion of the Club image and projects. Club members share their ideas and vote to create a consensus of those ideas for their future. During the Club Visioning event, planning is introduced so that Club members have an opportunity to learn how to create Club Action Plans. The results from a Club Visioning event provide a framework for discussions with the rest of the Club members for creating the final Action Plans so Club members are working to accomplish the same outcome.

Your role as a facilitator is to support a Rotary Club in creating their club's Vision that helps the club better plan for their future. You will be working on a district team to plan and conduct the Club Visioning event for a club.

The Club Visioning process uses the Rotary International Vision Statement and Rotary Action Plan Priorities as a base for Club Visioning.

LEARNING ASSIGNMENT:

Review pages 3 – 5 in the Workbook to learn about the RI Vision Statement/Action Plan, the Club Visioning Process steps, and activities before/after a Club Visioning event.

View the [WHY CLUB VISIONING VIDEO](#)

View the Help Sheet pages 21 – 22 in the Workbook to see the Club Visioning event agenda and what event activities are covered by which facilitator role.

We will next explore the facilitation team roles.

Facilitation Team Roles

The Club Visioning process has seven facilitator roles on the team:

- 1) **Lead**- works with the club contact to set up the event, assigns the facilitator team roles, manages the club Visioning event flow, and send out the post event materials.
- 2) **Presenter**- leads introductions and presents the basics of Club Visioning
- 3) **Extractor**- asks club participants for Vision ideas, ensures member participation, and leads voting.
- 4) **Scribe**- captures the Vision ideas on flipchart or computer
- 5) **Summarizer**- shares a view of the club's Vision to help members see their club 3 years in the future
- 6) **Planner**- explains Master Plan & Action Plan, leads the Action Plan practice exercise, and enrolls club volunteers to lead Next Step action items.
- 7) **Technical Host (Virtual only)**- handles the technology platform and address any technical problems

The team facilitator roles are the same for an on-site Club Visioning and a Virtual Club Visioning except for the Technical Host role is needed in a virtual Club Visioning. Note that a facilitator on the team may play one or two or even three roles during a Club Visioning event. The minimum number of facilitators required on a team to conduct an on-site Club Visioning is three, but four would be better for extraction if using flip charts.

LEARNING ASSIGNMENT:

- Read pages 5 – 8 in the Workbook to learn about the facilitator roles and skills.

We next will go into more detail on each of the facilitator roles.

1) LEAD

The Lead coordinates with the club, that is asked to appoint a Club Visioning Coordinator, after the club requests a Club Visioning Event and follows the timeline for before, during, and after the event. This individual will be responsible for providing materials to and coordinating with the Club Visioning Coordinator before, during, and after the event. Additionally, the Lead organizes and communicates with the Facilitation Team. This role is best handled by an experienced facilitator in Club Visioning who has demonstrated proficiency in the other roles.

2) PRESENTER

The Presenter will be primarily responsible for setting the stage for the Club Visioning by first creating a welcoming environment with Introduction and then delivering the Club Visioning event PowerPoint presentation. The Club Visioning event Powerpoint is available for your review from the District Visioning Chair (downloaded from the client portal of rivationfacilitation.org).

3) EXTRACTOR

The Extractor solicits club members' Vision ideas from their Vision Exercise by calling on participants who raise their hands and then works with the participants to "soundbite " (3-5 words) their responses for the Scribes to capture either on a flip chart or on the computer scribing form. The Extractor ensures full club member participation by noticing and calling on members who are not participating.

LEARNING ASSIGNMENT:

- Review Vision Exercise in the Workbook pages 11 - 16
- View the [Extraction and Scribing Demonstration Video](#)

4) SCRIBE

Whether on-site or virtual, the Scribe is responsible for capturing the ideas shared by the participants that have been evoked by the Extractor from their Vision Exercise. Communication with Extractor is key to ensure Vision ideas are captured correctly. If scribing on flipcharts, clarity of handwriting is important. If entering idea on a technology tool, technical skills are required.

LEARNING ASSIGNMENT:

- Reread about *Scribe Using Flipchart* and *Scribe Using Technology Tool* in the Workbook pages 6 - 7
- View the [Scribing on Flipcharts – best practices Video](#)
- View [Club Membership- Club Size Scribe grouping Video](#)
- View the [Extraction and Scribing Demonstration Video with Technology Tool](#)

After all the Vision ideas have been extracted and scribed, the Extractor or another member of the facilitator team, leads the Voting to prioritize the top Vision ideas. Voting is done either on the flipcharts using dots or on computer form using QR code or link.

LEARNING ASSIGNMENT:

- Read about *Voting Using Flipcharts* and *Voting Using Technology Tool* in the Workbook pages 7 - 8
- View the [Voting onsite using flipcharts Video](#)
- View the [Voting with Technology Tool Video](#)

5) SUMMARIZER

After the two rounds of voting is complete, the Scribe(s) and other facilitation team members identify the top 2-3 Vision ideas in each Rotary Action Plan priority to share. The Summarizer shares, with enthusiasm, a view of the club's Vision to help members see their club 3 years in the future

LEARNING ASSIGNMENT:

- Read about Sumarizer in the Workbook page 8
- View the [Summarization of Wall Charts Using the RI Action Plan Video](#)
- View the [Summarization of Voting with technology tool using RI Action Plan](#)

6) PLANNER

The Planner serves in a critical role to help the club members take their extracted ideas, after prioritizing, and turn the ideas into goals on a Master Plan. The Planner shows the club members that once changed to goals, Action Plans must be developed. The Planner is responsible for the 15 minute small group practice on site or the Zoom breakout activity if virtual. Having them share their practice in developing an Action Plan is facilitated by the Planner. Then the Planner asks members to volunteer for assignments to begin the process of implementing their ideas. The Planner should be experienced in the Club Visioning Process and comfortable leading the learning on the Vision to Success portion of the facilitation.

LEARNING ASSIGNMENT:

- Read about Planner in the Workbook page 8
- Review the Master Plan template and example in Workbook page 18
- View the Action Plan template and example in Workbook pages 19 - 20
- View the [How to introduce small group exercise Video](#)
- View the [Sharing results of small group exercixse Video](#)
- View the [Vision to Success- Next Steps Video](#)

7) TECHNICAL HOST

The Tech Host role is utilized if the Club Visioning Event is held virtually or in a hybrid format. The Tech Host role is responsible for ensuring all the technology programs and the Zoom platform are set up and technology instructions are specific so club members can optimally utilize the technology. The Technical Host role requires good computer technical tools (Zoom, Google forms or Survey Monkey) skills and may not be a role for all team members. Additional learning materials are available for this role.

Putting it all Together

After familiarizing yourself with the facilitator roles, you will now want to look at Club Visioning event flow and Practical Tips to help you succeed. Check in with your District Vision Chair or knowledgeable Club Visioning facilitator coach to answer any questions you have and to practice any roles. We recommend you be an observer or participate in a Club Visioning event as soon as possible.

LEARNING ASSIGNMENT:

- Read Club Visioning Event flow in Workbook page 9
- Read Practical Tips to help you succeed in Workbook page 10
- Review Help Sheet in Workbook page 21 - 22
- Review Vision to Success Guide page 23 - 25

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