

Club Visioning

Virtual Delivery Model



Technical Guide

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INTRODUCTION

Overview

Statement of Purpose

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

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

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

Steps in Virtual Delivery complete process

- 1. Presentation to Club about Visioning**
- 2. Coordination with District Vision Chair and Club to schedule event**
 - a. Optional technical practice with Club**
- 3. Set up of Zoom platform by Technical Host team member**
 - a. Assignment of team roles by Lead and a team technical rehearsal**
- 4. Distribution of electronic RVQ (Rotary Visioning Questionnaire) to entire club**
- 5. Distribution of electronic Vision Exercise and supporting documents**
- 6. Visioning Session 1**
 - a. Extraction of Vision Exercise ideas and voting**
- 7. Visioning Session 2**
 - a. Summary of consolidated ideas and Action Plan exercise breakout**
 - b. Vision to Success including Next Steps**
- 8. Distribution of Visioning results to club**
 - a. Action Plan worksheet and Master Plan template**
 - b. Vision to Success Guide**
- 9. Follow up by District lead as needed**

1. Presentation to Club about Visioning

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

2. Coordination with District Chair and Club

As the club invites the District Visioning team to schedule a choice of delivery methods is made; On Site or Virtual. Requirements for Virtual Delivery:

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

3. Set up of Zoom Platform by Technical Host

A member of the District Visioning team with proven experience serves as a Technical Host of the Zoom meetings to include

- Registration set up on platform with link shared to Club lead
- Set up of Breakout rooms and Polls
- Ideally 2 monitors

Assignment of team members by Team Lead and technical rehearsal scheduled for team

- Technical Host
- Presenter
- Scribe
- Extractor
- Action Plan breakout leaders

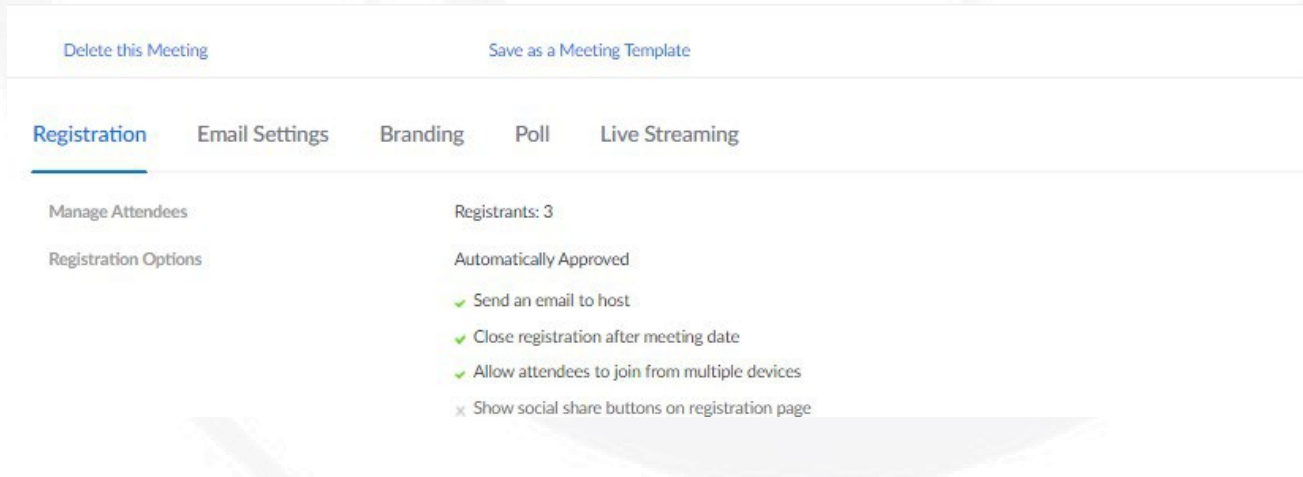
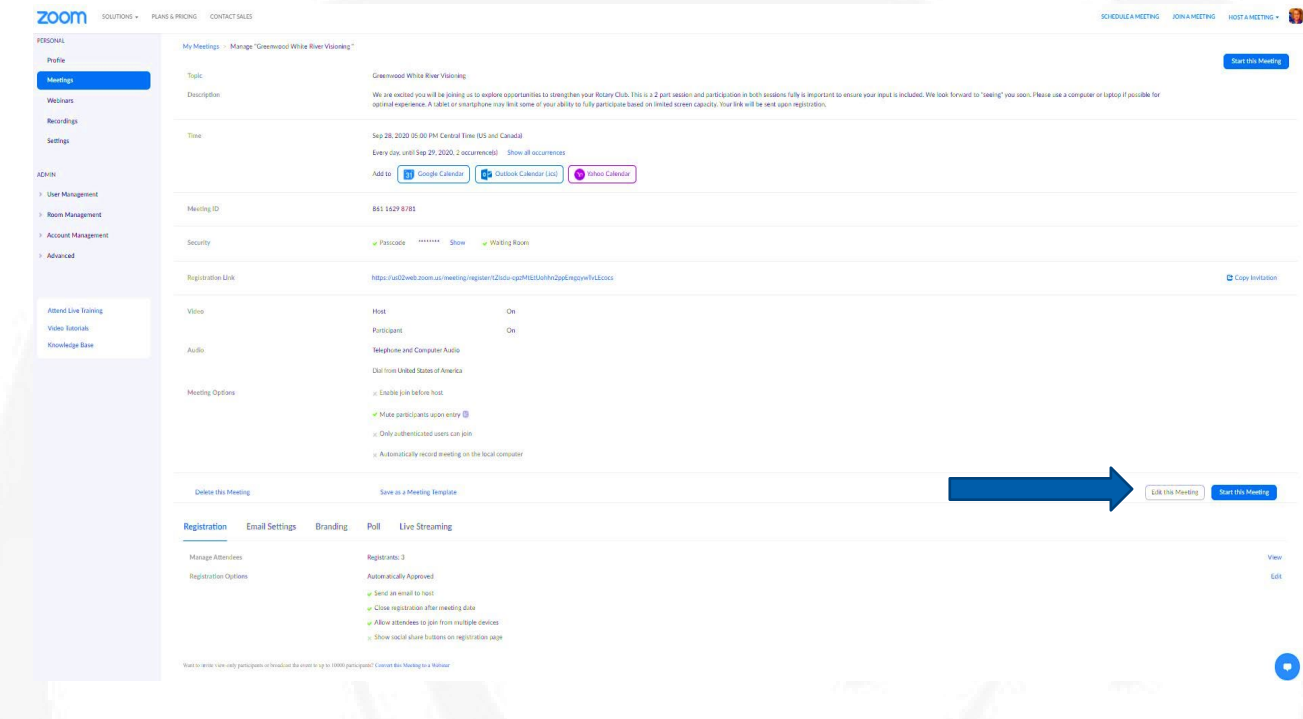
Zoom Configuration Guide for Virtual Delivery

The configuration of the Zoom platform will be done by the Technical Host. The District would maintain a subscription to Zoom. This can be purchased at www.zoom.us and the Pro version is recommended. Attendees will need to “Download Zoom Client” on their computer, laptop, tablet or smartphone.

After a set of dates has been arranged the technical host will set up a recurring meeting in the Zoom account using a pre-saved template. Registration is to be set as required to support the breakout rooms, as well as a passcode, to provide a level of security. The time of day will need to be the same for recurring setup. Activate “Breakout Room pre-assign”. The setup is then “saved”

The screenshot shows the Zoom meeting configuration interface. The left sidebar contains navigation options: PERSONAL (Profile, Meetings, Webinars, Recordings, Settings) and ADMIN (User Management, Room Management, Account Management, Advanced, Attend Live Training, Video Tutorials, Knowledge Base). The main content area is titled 'My Meetings - Edit "Greenwood White River Visioning"'. The configuration fields include: Topic (Greenwood White River Visioning), Description (Optional) (We are excited you will be joining us to explore opportunities to strengthen your Rotary Club...), When (09/28/2020, 5:00 PM), Duration (2 hr 0 min), Time Zone ((GMT-5:00) Central Time (US and Canada)), Recurring meeting (checked, Every day, until Sep 29, 2020, 2 occurrence(s)), Recurrence (Daily), Repeat every (1 day), End date (By 09/29/2020, 7 occurrences), Registration (checked, Required), Security (checked, Passcode: Vision, Waiting Room), Video (Host on, Participant on), Audio (Both), Meeting Options (Mute participants upon entry checked, Breakout Room pre-assign checked), and Alternative Hosts (Example: mary@company.com, peter@school.edu). Save and Cancel buttons are at the bottom.

Once meeting is set up then on the meeting screen you will see an option to **“Copy Invitation”** on the far right. That is the link that is sent to the Facilitation team and the Club contact for registration. This should be set up as soon as the meeting time is confirmed to the Club contact with the instruction to only send the registration link to those club representatives who will be participating in the session. The Bottom portion of the meeting page is here you will configure your registration setups, email templates, Branding and Polls.



Setup:

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

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

The screenshot shows the 'Registration' tab of a setup window. It has three tabs: 'Registration', 'Questions', and 'Custom Questions'. The 'Registration' tab is active. Under 'Approval', 'Automatically Approve' is selected. Under 'Notification', 'Send an email to host when someone registers' is checked. Under 'Other options', 'Allow attendees to join from multiple devices' is checked. 'Save All' and 'Cancel' buttons are at the bottom right.

Click

The screenshot shows the 'Questions' tab of the setup window. It has three tabs: 'Registration', 'Questions', and 'Custom Questions'. The 'Questions' tab is active. Under 'Add Registration Fields', 'Last Name' is selected and marked as required. Other fields like 'Field', 'Address', 'City', etc., are not selected. 'Save All' and 'Cancel' buttons are at the bottom right.

Choose **Custom Questions** at top and add

The screenshot shows the 'Custom Questions' tab of the setup window. It has three tabs: 'Registration', 'Questions', and 'Custom Questions'. The 'Custom Questions' tab is active. A table lists a custom question: 'Current role in Club' which is required. A 'New Question' button is at the bottom left. 'Save All' and 'Cancel' buttons are at the bottom right.

Choose **Save All**

Email Settings

Registration **Email Settings** Branding Poll Live Streaming

Email Contact: Joe Hagedorn, jhagedorn6580@gmail.com
Confirmation Email to Registrants: Send upon registration Send me a preview email

Edit

English | Edit

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

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

Indicate who the Name and email address will be for contact information. Choose **SAVE**

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

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

Confirmation Email

Send Confirmation Email to Registrants

Subject
Greenwood White River Rotary Club Visioning

Body
Hi [User Name],
Thank you for registering for "Greenwood White River Visioning".
participation. Your log in is unique to you and should not be forwarded or shared. Please save it because you will use the same log in for both sessions. Participation in both full sessions is very important to have your full input included in the experience.

Please submit any questions to: jhagedorn6580@gmail.com

Date Time: Sep 28, 2020 05:00 PM Central Time (US and Canada)
Every day, until Sep 29, 2020, 2 occurrence(s)
Sep 28, 2020 05:00 PM
Sep 29, 2020 05:00 PM
Please download and import the following iCalendar (.ics) files to your calendar system.
Daily: <https://us02web.zoom.us/join/98tyKuGurzosGN2dxGGRpwABYj4M-rxmFxa7d0kxftDXJDCib7MfNBjYzpp3T>
icsToken=98tyKuGurzosGN2dxGGRpwABYj4M-rxmFxa7d0kxftDXJDCib7MfNBjYzpp3T

Join from PC, Mac, Linux, iOS or Android: [\[Join Link\]](#)
Passcode: Vision
Note: This link should not be shared with others; it is unique to you.
[Add to Calendar](#) [Add to Google Calendar](#) [Add to Yahoo Calendar](#)

Or iPhone one-tap
US: +12063379723,86116298781#
Or Telephone:
Dial(for higher quality, dial a number based on your current location):
US: +1 206 337 9723
Meeting ID: 861 1629 8781
Passcode: 682410

Your Virtual Club Visioning Team is looking forward to meeting you soon! Please complete the writing experience (to be sent in a separate email) prior to our first session and have it readily available to refer to during our call.

You can [cancel](#) your registration at any time.

Save **Cancel**

Branding

Registration Email Settings **Branding** Poll Live Streaming

Banner

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



Change Delete Edit Description

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

Poll

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

Registration Email Settings Branding **Poll** Live Streaming

You have created 2 polls for this meeting. Add

Title	Total Questions	Anonymous	
~ Poll 1: Writing Experience	1 question	No	Edit Delete
~ Poll 2: Survey	4 questions	No	Edit Delete

Want to invite view-only participants or broadcast the event to up to 10000 participants? Convert this Meeting to a Webinar

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

Writing Experience

Anonymous? ⓘ

1.

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

Single Choice Multiple Choice

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

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

Our club has lots of room for improvement in 3 yrs

Answer A (Optional)

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

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

Single Choice Multiple Choice

Absolutely

Somewhat

Not really helpful

Answer 4 (Optional)

Answer 5 (Optional)

Answer 6 (Optional)

Answer 7 (Optional)

Answer 8 (Optional)

Answer 9 (Optional)

Answer 10 (Optional)

Delete

2. I found the Virtual Visioning Experience to be//// Edit Delete

3. I found the technology Edit Delete

4. I found the Visioning Facilitators to be..... Edit Delete

1. I found the Club Visioning Experience to be benefi... Edit

2. I found the Virtual Visioning Experience to be//// 205

Single Choice Multiple Choice

Preferred over an onsite session

As effective as an onsite session

Less effective than an onsite session

Answer 4 (Optional)

1. I found the Club Visioning Experience to be benefi... Edit

2. I found the Virtual Visioning Experience to be//// Edit Delete

3. I found the technology 233

Single Choice Multiple Choice

helpful

neutral

difficult to navigate

Answer 4 (Optional)

1. I found the Club Visioning Experience to be benefi... Edit

2. I found the Virtual Visioning Experience to be//// Edit Delete

3. I found the technology Edit Delete

4. I found the Visioning Facilitators to be..... 210

Single Choice Multiple Choice

Very engaging

Somewhat engaging

Difficult to engage with

Answer 4 (Optional)

Answer 5 (Optional)

After both polls set up then suggest Save as a Meeting Template just above the Poll option

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

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

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

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

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

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

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

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

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

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

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

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

The Visioning Process has 10 steps

As indicated by agenda items below

1. Status Assessment (Club Profile or Rotary Vision Questionnaire)
2. Introductions & Rules of the Room
3. PPT. Presentation
4. Vision exercise
5. Extraction
6. Round 1 Voting
7. Round 2 Voting
8. Summary/Synthesis
9. 5 Step Follow-up Action Plan
10. Vision to Success

4. Distribution of Rotary Visioning Questionnaire (RVQ)

[Survey Monkey or Google Forms offers a powerful tool for online distribution utilizing Template from IFVC](#)

Distribution of the RVQ can be handled through email 2 weeks prior to event to all club members. Survey Monkey or Google Forms allows for a survey to be posted online and accessed by anyone with the link. This allows easy distribution. Survey Monkey or Google Forms will then track responses, allowing the administrator to easily ascertain which participants have not yet participated, and to automatically send out reminders. Survey Monkey or Google Forms will also allow you to view and print responses, by participant, for review and distribution at the event.

The District Vision Chair can download the RVQ Template from IVFC website or request the IVFC form.

VISION FACILITATION

Rotary Visioning Questionnaire Master

Please complete all questions as your input is very valuable

1. General Information

Rotary Club Name

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

Strongly Disagree Disagree Undecided Agree Strongly Agree

Comments

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

Strongly Disagree Disagree Undecided Agree Strongly Agree

Comments

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

Strongly Disagree Disagree Undecided Agree Strongly Agree

Comments

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

Strongly Disagree Disagree Undecided Agree Strongly Agree

Comments

5. Distribution of Visioning Exercise

The Visioning Exercise (Provided by IVFC to District Chair on IVFC Website) should be sent electronically only to the representatives of the club that will participate in the actual Club Visioning. This document along with the other 3 supporting documents (Club Models, The Rotary Foundation Information sheet, and the Rotary Vision and Action Plan) should be sent no more than 1 week, and no less than 3 days prior to scheduled event with instructions to have the exercise completed, and accessible during the 1st Visioning Session.

VISION EXERCISE

“The Club, not as it is, but as it has become...”

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

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

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

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

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

Place yourself fully in the future. What would you tell your new neighbors about your club’s accomplishments over the last three years? Complete your exercise and bring it with you to your Visioning session.

Over the past 3 years, because of our exceptional blend of vision, membership attributes that embrace flexibility, project activities, partnerships, and use of the Rotary Action Plan as :

6. Visioning Session 1

Ask attendees to log into Zoom meeting 15 minutes prior to Session 1 and are held in waiting room with admission by Technical Host 10 minutes prior to session. All members are brought in on “Mute”. The Visioning team welcomes them and ensures all attendees have their names visible on the Zoom screen. Any phone only attendees are asked by technical host to identify themselves the host will “rename” them on screen. The Zoom meeting should then be started at scheduled time.

- Slide presentation template provided by IVFC (customized with club name)
- Start with technical slide and have attendees “practice” raising hands, reactions, chat and mute function. Explain Gallery view and Speaker view.²
- Visioning team with quick introduction starting with Technical Host then pass to next with ending at Presenter who has a list of attendees from registration
- Attendees are called by name, asked to unmute, and share their current club role and how many years in club. Stop screen share and put in Gallery view
- PowerPoint presentation begins.
- Poll #1 launched (See technical resource guide)
- Extraction explained focus on “headlines”
- Extractor calls on those with hands raised, asks to unmute and report and also option to put into Chat where ideas are read aloud.
- Scribe documents directly into Survey Monkey by action plan category in blocks for voting (see writing experience instructions)

Extraction into Survey Monkey or Google Forms

Learning Video at <https://youtu.be/VQ4wbxc82Gg>

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

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

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

EDIT

OPTIONS

LOGIC

MOVE

COPY

Q1

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

4 Votes

Checkboxes



EDIT

OPTIONS

LOGIC

MOVE

COPY



Require an Answer to This Question



Number of choices respondents must answer:

exactly

4

Display this error message when this question is not answered.

This question requires an answer.

Scribing into Survey Monkey or Google Forms

Staying in Design page and “edit” each section. Suggest save a template and then copy for each club.



Learning video at <https://www.youtube.com/watch?v=ASYkQ4QzQCc>

7. Voting Round 1

After extraction, explain electronic voting the place the link for Round 1 voting in the Chat. (Survey Monkey or Google Form link from completed extraction). Participants are asked to click on the link (or copy and open in a 2nd browser tab) and complete survey within the next 10 min if possible. The Club lead is responsible to email any attendees having difficulty in Chat.

- Scribe can be the same as technical host or additional team member with a shared screen for scribing
- Scribe verifies votes received from all participants and copies full Survey Monkey or Google Form results for preparation of Round 2 voting
- Scribe reduces choices from round 1 vote to the recommended number to gain consensus in round 2 (see writing experience instructions)
- Technical host configures Zoom breakout rooms with assigned attendees
- Breakout document for Action Plan sent via email to attendees prior to Session 2

8. Voting Round 2

When Round 1 voting is complete and the Scribe has prepared Round 2 voting link for Chat, the participants can vote. If not enough time in Session 1 or the Scribe is not able to consolidate votes in time to create a link, a link to Round 2 voting link can be distributed prior to session 2 for completion based on the consolidated items from Round 1 voting

9. Visioning Session 2

Session 2 begins with the tech review slide. Again, verify everyone knows how to unmute when called upon and use chat

10. Summary

Prior to Session 2, the Scribe verifies votes received and prepares summary quickly based on the RI Action Plan. The Scribe shares the summary voting screens,

Learning Video of Summary- <https://www.youtube.com/watch?v=pjTrz9n-GcE>

11. Implementation Plan

Presenter covers the PowerPoint slides

12. Breakout: Creating Action Plans

Attendees are sent into a breakout room by pre-determined groups for 15 minutes with the instructions in the PowerPoint

- Technical host sends to breakouts for 15 min with 1-minute warning
 - Attendees are brought back to main room after breakout

13. Vision to Success Assignment

Vision to Success Template is shared on screen for scribing

- Scribe documents who and by when based on presenter facilitation of volunteers
- Thank attendees
- Ask if there are any questions or concerns
- Launch poll 2 (see technical resource guide)
- Session ends and team debriefs

14. Vision to Success

- Both full survey results sent to club contact along with Master Plan template and Action Plan with instructions
- Club begins to develop action plans for each identified priority based on the identified processes.