VISION™
HELP SHEET- ONSITE VISIONING

EXAMPLE OF ASSIGNMENTS FOR THE EVENT:

Opening remarks – Lead
PowerPoint Presentation – Presenter
Extraction – Extractor (extracts the ideas from the participants)
Scribing – Scribe (records the ideas on flipcharts or computer)
Voting Exercise – Extractor (organizes two rounds of voting)
Summarization – Summarizer leads, assisted by team
Vision to Success – Planner (explains: Master Plan, Action Plan, Action Plan Practice, Next Steps Assignments)
Closing Remarks – Lead
Debrief - Lead

Bring Camera, Laptop, Projector Extra Writing Exercises, Action Plans, Handouts and Extra Supplies

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 – 5:10	Start Buffet line or box supper and be seated for meal
5:10 – 5:15	Club President welcome all to event
5:15 – 5:20	Start the Club Visioning event PowerPoint *(while everyone is eating)*
	Includes Introduction of Facilitation Team and Rules of the Room
5:20 – 5:45	Introduction of Rotary club members: ***Name, number of years in Rotary (in this club or others), and club role***
	Introduce Club Visioning and Vision Exercise
5:45 – 5:50	Clean-up meal mess/bathroom break
5:50 – 7:20	Extraction and Scribing of as many sheets as are needed
7:20 – 7:30	Break - *(cross out redundant statements, MOVE elements that are in the "wrong" category if needed)*
7:30 – 7:50	Voting- **Round 1** - Blue Dots or online voting 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)***

Voting- **Round 2** - Red Dot or online voting prioritization on each of the Categories. Use same number of votes as above but delete Size. Also other categories may need less votes to obtain the top 2-4 ideas in each Category.

8:00 – 8:10	Summarize verbally the top 2-4 ideas in each Category using the above Rotary Action Plan priorities
8:10 – 8:40	Vision to Success: explain Master Plan and Action Plan. Practice Action Plan by dividing the participants into groups of 3-5 and giving them 15 minutes to draft an Action Plan. Have a group representative share summary of the results.
8:40 – 9:00	Vision to Success: ask for volunteers on Next Steps while Scribes capture the names and dates for each of the six assignments on a flipchart or spreadsheet form.
	Closing questions/remarks and discuss observations to the extent that the group wishes, handout/send Survey

ACTION	WHO	WHEN (Specific Date)
Gather the list of ideas charts or obtain the technology tool voting results	*John, our club secretary or volunteer*	*ASAP up to 1 week using the facilitation team provided Excel template or the technology form*
Create a statement of purpose, vision statement, motto, or "elevator speech" for club	*Mike, Jenny and Sue (3 or more mixed gender with one as chair)*	*3 weeks (in preparation for our Club Assembly)*
Establish process and develop the Master Plan	*President , PE, 1 or 2 others who participated in event*	*2-3 weeks to have Master Plan done*
Share Visioning results with club	*President Steve with others from event*	*Upcoming Club meeting or Club Assembly in 2 - 4 weeks…PowerPoint template will be sent for you to fill in your results to present*
Chose a Club Impact Leader or Team	*Well respected enthusiastic & experienced Rotarian(s)*	*Raise the Club Vision awareness and promotes Vision implementation*
Create an Action Plan for each idea in the Master Plan	*To be assigned to committee chairs or volunteers*	*Action Plans returned to President by ? (suggest 4-6 weeks if they don't answer)*

Welcome, Opening the session & Mealtime- *Lead*: Welcome, covers Rules of the Room (Cell phones off, Bathroom locations, Respect each other's views, One person speaks at a time, NO wrong answers or input), and introduces Facilitation team using the Club Visioning Event PowerPoint (see notes section for suggested verbiage).

Introduction of Club Members- *Presenter*: "We would like to know how long each of you has been involved in Rotary. So please state your name, how long you have been in Rotary and your role in the club."

Club Visioning Overview- *Presenter*: "We are here today to create your club's Vision for the next three years and start planning actions to reach that Vision. Vision answers the planning question: Where do we want to be? An Action Plan answers another planning question: How will we get there? Once you have a Vision defined, an Action Plan outlines Who needs to do What by When. Then all members know where you are going, how you will get there, and how to tell others (potential members) about this club."

Vision Exercise- *Extractor*: "Prior to coming to this event, you filled out the Vision Exercise. Now is the exciting time when we share these ideas with each other. (Read the opening of the Vision Exercise). In a moment, you'll be asked to imagine the future – to place yourself 3 years from today and look back on the success of your Rotary Club. You'll be asked to "see" your club not as it is, but as it has become".

Extraction and Scribing- *Extractor*: "We are now going to go through the questions one at a time, share your ideas, and put them on flipcharts (or type on computer) for all to review later in this event. As you share your thoughts, please help us consolidate your ideas to 3-6 words so that we have concise ideas posted on our flipcharts (or computer screen). Please use the past tense like "we created, we held..." Scribes will write the ideas on the flipcharts and post on the walls grouping each of the categories a bit apart in preparation for voting (or the Scribe will type on computer for display on the screen)."

Voting with Dots- *Extractor*: "There are 24/26 dots on your sheet, start at a chart (not all people at same chart), and move clockwise, only one dot on each of your favorite ideas based on how many dots the category gets." Prepare the sheets for second round by putting an X in the voting box on any ideas that will be eliminated in the next round to limit the choices on the second round to 5-7 thus eliminating those ideas with the lowest votes.

Voting with Technology Tool- *Extractor*: "Our Scribe has created a QR code that you can scan with your cell phone or iPad. You will be linked to a voting form, hit Next, and then vote for the stated number of ideas noted. You need to vote the exact number- if too few, you can't move to the next. Hit Submit when done." Scribe prepares 2nd round by eliminating ideas with lowest votes and creates a new QR code for voting using the same instructions.

Summarization- *Summarizer*: "Now we are going to review your top Vision ideas and look for any related trends or patterns." The Summarizer quickly (and with energy) makes observations using the flipcharts (or on the screen) on club patterns, theme or a type of club characteristic (i.e., fun, local service, youth, etc.). Invite your fellow team members to share observations. This is where the excitement increases for club members and some may offer comments as they envision the future of their club and community.

Master Plan/Action Plan/Practice- *Planner*: "What a great set of Club Visioning ideas! Now let me show you a process to take those ideas to implementation. You decide which ideas you will put into a Master Plan designating what you will do in year one, year two, and year three. Then for each idea, you will create a goal that is realistic, measurable, and has a time frame. For each goal, you will design an Action Plan. When all goals are created from the ideas, those goals go on the Master Plan to replace the ideas. During the breakout exercise, you will take a Vision goal (membership) and create an Action Plan with what/who/when for that goal." At the end of the breakout, a representative from each group will share a summary of their Action Plan and how the process went.

Next Step Assignments- *Planner*: "Now we need members to volunteer for the tasks that will implement the Vision. Let's look at the Next Steps." If they do not volunteer, be prepared to call on specific individuals and ask if they would be willing to do task.

Closing Comments- *Lead*: "It was a pleasure to work with each of you during your event. You have accomplished a tremendous amount in your event. In about 4 hours, you brainstormed and reached consensus on a set of priorities for near and long term action based on the Rotary Action Plan priorities plus Fundraising and Foundation. 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 plans for your club, and a way to help ensure continuity and consistency of focus and action into the future. We look forward to hearing more about all your club accomplishes over the next few years. As we close this session, let me ask you two questions:

- What doubts, worries, concerns, or reservations do you have about the discussion of your ideas and upcoming actions? (Listen to responses)
- What excites or energizes you most about what you have accomplished in this session?" (Listen and affirm)

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.