

HELP SHEET- VIRTUAL 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 – Scribe leads as Summarizer assisted by team
- Vision to Success – Planner (explains: Master Plan, Action Plan, Action Plan Practice, Next Steps Assignments)
- Closing Remarks – Lead
- Debrief - Lead

The Event – Timeline

(Times are approximate and will change depending on number of participants)

- 4:30 – 4:45 **Session 1:** Zoom Arrival of facilitation team and set-up
- 4:45 – 5:00 Welcome club members as they join the Zoom Visioning session
- 5:00 – 5:05 Club President welcome all to event
- 5:05 – 5:20 Start the Club Visioning event PowerPoint
Introduction of Facilitation Team and Rules of Zoom
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
- 5:20 – 6:30 Extraction and Scribing
- 6:30 – 6:40 Voting- **Round 1** - 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) |
- 6:40 – 6:50 Break - (**Scribe prepares the Round 2 Voting form**)
- 6:50 – 7:00 Voting- **Round 2** - 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.
- 4:30 – 4:45 **Session 2:** Zoom Arrival of facilitation team and set-up
- 4:45 – 5:00 Welcome back club members as they join the Zoom Visioning session
- 5:00 – 5:20 Start the Club Visioning event PowerPoint
Summarize verbally the top 2-4 ideas in each Category using the above Rotary Action Plan priorities
- 5:20 – 6:05 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.
- 6:05 – 6:30 Vision to Success: ask for volunteers on Next Steps while Scribes capture the names and dates for each of the six assignments on a spreadsheet form.
Closing questions/remarks and discuss observations to the extent that the group wishes, send Survey

ACTION	WHO	WHEN (Specific Date)
Obtain the technology tool voting results	John, our club secretary or volunteer	ASAP the facilitation team provides 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 Vision Champion or Impact 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)

HELP SHEET - Continued

Welcome, Opening the session & Mealtime- *Lead:* Welcome, covers Rules of the Zoom (Cell phones off, Bathroom locations, Respect each other's views, One person speaks at a time, NO wrong answers or input), take club picture and start recording, 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 type on computer for all to see and 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 the computer screen- Please use the past tense like "we created, we held..." The Scribe will type on computer for display on the screen in preparation of online voting.

Voting with Technology Tool- *Extractor:* "Our Scribe has created a computer link and put in chat. Click on it- 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 voting link 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 displayed 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.