



**FACILITATOR LEARNING
WORKBOOK**

International Vision Facilitation Council 2024

Club Visioning Facilitator Learning Workbook

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THOUGHTS ON HOW TO USE YOUR WORKBOOK:

As you go through facilitation learning, and eventually Club Visioning-events, take notes on what you absorb using this workbook. You will gain skills from Learning Facilitators, from your experiences, and from other facilitators who share ideas they have experienced.

Review suggested comments and adapt them to your style, your culture, and the Rotary culture in your clubs and area. The scripts are guides for the message; you should say it in a way that is natural to you and those around you.

Your **Help Sheet** guides you through the process, assists with suggested comments/questions, and helps keep you on schedule. Put your Help Sheet in a plastic sleeve or laminate it and keep it with you at Club Visioning events.

Trust the process. It has been used in multiple cultures, languages, countries, and clubs. It works in small clubs as well as large clubs. It works because it is simple, has a timeline, and builds consensus among club members.

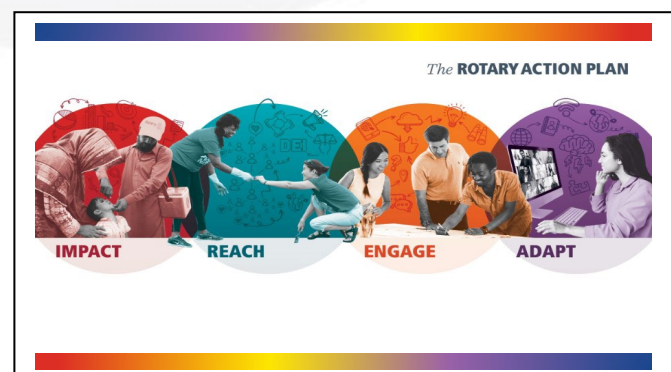
FORMS: At the back of the workbook are the following forms for your use:

- Vision Exercise
- Master Plan Form
- Action Plan Form
- Help Sheet
- Vision to Success Guide

Additional forms that are used are available through your District Vision Facilitation Chair.

Rotary International Vision Statement

Rotary international developed a Vision Statement. To achieve the vision of Rotary International and The Rotary Foundation, Rotary has set four priorities that will direct the work of Rotary over the foreseeable future. As we proceed through the Club Visioning Event, we will use this Vision Statement/Rotary Action Plan with the priorities to CONNECT Rotarians to this concept. As People of Action, we understand that **fulfilling that Vision requires a plan. The start of the plan begins with the Club Visioning.**



Facilitator Learning Workshop Agenda

BEFORE THE FACILITATOR LEARNING WORKSHOP:

Introduction message and distribution of below to participants:

- Vision Exercise
- Club Models
- Rotary Foundation Information

DAY OF FACILITATOR LEARNING WORKSHOP:

- Club Visioning - What, How, and Why
- The Process of Club Visioning
- Facilitator Roles and Skills
- Club Visioning Session Example
- Vision to Success
- Practical Tips
- Technology Tools
- Virtual Club Visioning
- Vision Resources: Website <https://rivationfacilitation.org/>
- Questions

Club Visioning Process

- Status Assessment (Club Profile and Rotary Vision Questionnaire)
- Vision Exercise (sent ahead to be filled out before event)
- Rules of the Room & Introductions
- Club Visioning Overview
- Extraction and Scribing
- Voting (2 rounds)
- Summarization
- Planning- Master Plan and Action Plan
- Vision to Success

BEFORE THE CLUB VISIONING:

- Invitation to participants and sign up
- Status Assessment (Club Profile and Rotary Vision Questionnaire)
- Vision Exercise / Club Models / Rotary Foundation Information

DAY OF THE CLUB VISIONING:

- Participant arrival/ meal (meal time TBD- start or at break after voting)
- Club President welcomes/Facilitator introductions

- Participant introductions/Visioning remarks: importance of a Vision and Plan
- Extract and scribe Vision Exercise ideas
- Vote on ideas: What does the Club want to do/become?
- Facilitator summarization, verbalizing: Who Club can be 3 years later
- Planning: Introduce Master plan, Goals, Action Plan, and Practice
- Club Assignments: What is next and who will lead?
- Closing remarks: Congratulations to club!

AFTER THE CLUB VISIONING:

- Gather the list of top ideas for sharing
- Decide which ideas will be done in year one, year two, year three (Master Plan)
- Share the Club Visioning results with club – gain agreement
- Create an Action Plan for each selected Vision ideas

CLUB VISIONING SCHEDULE:

- 4:30 Set-up/dinner / Socialize
- 5:00 Introductions / PowerPoint
- 5:30 Vision Exercise / Extraction
- 7:30 Voting / Two Rounds
- 7:50 Summary
- 8:00 Vision to Success: Master Plan/Action Plan/Practice/Next Steps
- 9:00 Adjourn

ROLE DESCRIPTIONS FOR CLUB VISIONING:

LEAD:

Key role to create and lead the team

- Makes the team facilitator role assignments
- Confirms with the Club Visioning Coordinator that the club is ready for a Visioning
- Guides the team and manages the overall Club Visioning flow
- Opens and Closes the Club Visioning
- Is ready to perform the roles of the Presenter, Extractor, Scribe, Summarizer, or Planner as needed
- Leads the post Club Visioning team debrief
- Sends out post Club Visioning event deliverables

PRESENTER:

Ensures a good Visioning start and covers basics about the process of Club Visioning

- Leads introduction of the District Visioning facilitation team and club participants
- Covers the What, How, and Why of Club Visioning

- Shares the Rotary International Vision Statement and Action Plan

EXTRACTOR:

Asks Club participant for Vision ideas and ensures member participation

- Handles the asking of club member Vision ideas in coordination with the Scribe
- Encourages those not participating to contribute their ideas
- Asks probing questions to clarify ideas as needed

SCRIBE:

Captures the Vision ideas and does a summary of the ideas

- Captures the ideas contributed by club members on newsprint during extraction
- Sets up 2 rounds of voting
- Leads (or assists) sharing summarization of Club future (Based on results of voting)

RUNNER:

Helps manage the charting process

- Assists the Scribes capturing ideas
- Places sheets around the room – uses Blue Painters tape to separate groupings
- Assists Synthesizer in tallying votes

FACILITATION SKILLS:

LEAD/PRESENTER/PLANNER:

- Is comfortable with Introductions
- Presents a PowerPoint effectively
- Answers Rotary questions
- Is deliberate in presenting instructions

EXTRACTOR:

- Controls the room (Scribes, pace...)
- Involves ALL participants and keeps order
- Reflects and rewords ideas using Headlines, bullet points, Tweets
- Change verbs from present tense to past tense
- Jump starts the group
- Handles disruptive participants
- Reminds participants: Today we are recording ideas, details will get flushed out later

SCRIBES USING WALL CHARTS:

- Work as a team capturing ideas
- Listens to complex answers and distills information to 3-6 words
- Prints clearly
- Creates charts with 4" rows (x 4" voting boxes)
- Manages the charting process
 - # all pages
 - Abbreviations & Acronyms- Good if Understood

- Keep charts posted in order & groupings
- Assist the Extractor as needed
- Uses Black & Blue markers for Scribes – Red & Orange markers for Summarizer

<i>Sample Newsprint:</i>	
	Image in Community
	Fun
	Doing good works
	Club gets things done
	Friendly/welcoming
	Promote Youth development
	Active in Rotary 7 Areas of Focus

SCRIBE USING TECHNOLOGY TOOL (Google Forms or SurveyMonkey):

- Scribe directly into the technology tool which is displayed on the screen
- Generate a QR Code from the technology tool for a voting link
- Participants scan the QR Code with phone/iPad
- Participants complete voting in the technology tool

VOTING USING FLIPCHARTS:

- Put Blue Tape up to separate the areas of voting
- With an alternate color marker indicate how many votes the area gets
- Remind participants to start at different areas and work clockwise
- No dot stacking! (only 1 vote per idea)

Round 1 - Blue Dot prioritization on each of the 7 areas:

ABILITY TO ADAPT:	<i>Vision Pursued/Relevance</i>	(4 Votes)
EXPAND REACH:	<i>Size</i>	(1 Vote)
	<i>Attributes/Public Image</i>	(4 Votes)
ENHANCE ENGAGEMENT:	<i>Engaging Members/Leadership Development</i>	(5 Votes)
INCREASE IMPACT:	<i>Community Service/International Service</i>	(6 Votes)
	<i>Fundraisers</i>	(2 Votes)
	<i>Foundations</i>	(2 Votes)

Round 2 – After Round 1 is complete, prepare sheets for a second round:

- Eliminate ideas with lowest votes by putting an X in the voting box
- Limit the choices on the second round to 5-7
- Remove Size (established in initial voting) and adjust votes in others as needed

VOTING USING TECHNOLOGY TOOL:

- Scribing form is closed at completion of extraction, a copy made, and a Round 1 Voting QR code is generated for participants

- Participants scan the QR code for voting form link and vote (Hit Submit at the end)
- Scribe uses voting results to eliminate lower vote ideas for Round 2 Voting QR code

SUMMARIZER:

- Uses the Rotary Action Plan priorities plus Fundraising and Foundation to give a picture of the club in 3 years
- Assists the members in seeing their future with enthusiasm
- Drafts a mission/vision statement on the fly...
- Manages the input of fellow facilitators during the summary phase

PLANNER:

Outlines next steps from the event by showing members how to create the club Multiyear Plan and Action Plans

- Shares the Master Plan concept and Action Plan templates
- Facilitates the group practice for training participants to create an Action Plan
- Enrolls club volunteers to lead Next Step action items

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

THE CLUB VISIONING EVENT:

Introductions and Overview:

- **Club President welcomes everybody. Vision Team introduces themselves.**
- **Rules of the Room-** Cell phones off, Bathroom locations, Respect each other's views, One person speaks at a time, NO wrong ideas.
- **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."
- **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).

Extracting 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 the 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 Scribe will type on computer for display on the screen)."

Voting with Dots: *Extractor:* "There are 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 question. If too many, it won't allow you to move forward. Hit Submit when done." Scribe prepares 2nd round by eliminating ideas with lowest votes and creates a new QR code for voting.

Summary with Flipchart:

- Go to each of the areas, count the second vote of dots and identify the top 2-4 ideas.
- With a different color marker than used by the scribes (red), underline the key words if using flipchart.
- Summarizer then gives a verbal report on the top 2-3 ideas (circled) for each area.
- **Frame your comments:** The Club Increased your Ability to Adapt by.... Expanded your reach by..... Enhanced your Engagement by.....Increased your Impact by.....

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 the 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 the what/who/when for that goal. At the end of the breakout, a representative from each group will share a summary of the 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. We look forward to hearing more about all your club accomplishes over the next few years." (The the concept is to congratulate them, and encourage them to implement their plan- see Help Sheet for more comments.)

PRACTICAL TIPS TO HELP YOU SUCCEED:

CHECK ROOM SET-UP

- Arrive early to verify room set-up
 - U-Shape of tables
 - Easels and Wall space for Flipcharts
 - Where computer screen will be projected
- Tent/Name Cards -Identify President, PE, etc. Make sure extractor can read names.
- As Rotarians arrive – Meet & Greet

EVENT TIMELINE:

- Use the **“Help Sheet”** to stay on time – BRING A CLOCK
- Stay on time to retain attendance & enthusiasm
- Encourage FUN but control progress
- Adjust times as you go to manage completion time (the team works together)
- Use transitions to move the discussion

SEGUES TO MOVE DISCUSSION ALONG:

- “We’ll get back to this if we have time later...”
- “Great Discussion – encourage you to continue at break time”
- “Suggest you add to an agenda or board meeting discussion”
- “Don’t get hung up in the details today, let’s focus on the big picture”
- How do you handle interruptions? People coming and going?
- What other ideas do you have, challenges that you anticipate?
- Other:

VIRTUAL CLUB VISIONING DELIVERY:

The International Vision Facilitation Council (IVFC) has also created Club Visioning as a virtual event using Zoom and technology tools. Virtual Club Visioning events are conducted by District Club Visioning Facilitators with two 2+ hour sessions. Facilitator Learning sessions are available to utilize this valuable delivery system. It is especially helpful with Districts who are geographically widespread, with Districts who have a small pool of facilitators (facilitators do not have to travel), and certainly has been helpful during the pandemic when groups were reluctant to come together in person.

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 happened 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 priorities:

- 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** a 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 Vision 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, projects, activities, partnerships, and use of the Rotary Action Plan as a guide to broaden our ability to serve, we have accomplished the following:

Priority: Increase our Ability to Adapt

How we are known and how we connect

1. Because of the **Vision** we **pursued** our club is known for the following ... (How is your club perceived in the community? For example: **What does your Club “Stand For”** in your Community? Who are you now? What have you become? How are you described by members and those outside the club? Avoid referring to specific programs at this time. You will list specific programs later in this exercise.)

2. Because we embraced flexibility and changed our **club** to be more **relevant** to our membership and our community, our club now... (What changes have you made in your club structure or procedures? For example: Did you change your meeting time? Or do you meet only twice a month for a meeting, once a month for a social, and once a month for a service project? Or did you make meals pay as you go? Or did you develop a Satellite club or try another Club Model? *See **Club Models** handout.)

Priority: Expand our Reach

Attributes are who we are

Public Image is how we communicate who we are & what we do

- 3. Because of our determination to grow our **club size**, we now have ____ members.
- 4. Because of our efforts, our **club attributes** are now ... (How do you describe your club and club members? For example: What are your demographics, qualities, characteristics, traits, core values, diversities, etc.?)

- 5. Because of our attention to **Public Image**, we increased awareness of Rotary in our community by... (How do those outside of your club view your club and know of your club? For example: How are you promoting your club to the general public? How do you make the general public aware of projects and programs? Does your club website reflect Rotary Branding? Do you use social media, construct signage or bill boards, or use the “People of Action” campaign?)

Priority: Enhance Participant Engagement

How our members are active

6. Because of our attention to **engaging our members**, we ... (How did you engage your members? For example: Did you create relevant/dynamic weekly programs, provide opportunities for membership engagement at all club functions, offer opportunities for personal (friendships) and professional (networking) connection, or implement tools for internal club communication? Did you encourage participation in activities beyond the club level, engage new members immediately, have active committee work, hold club socials, and include fun☺?)

7. Because we provided the following **Leadership Development** and Skills Training, we... (What opportunities did you provide for developing leaders? For example: Did you encourage learning opportunities such as Toastmasters participation, create awareness of any Leadership programs provided by your district? Did you mentor within the club, create continuity planning for club leadership, or educate your members about the importance of impactful service projects?)

Priority: Increase our Impact

How we serve at home and afar

8. Because we valued **servicing our community**, we took part in the following ... (Did you do **Community Service** projects? Examples are community assessment, highway cleanup, helping at the food banks... Did you do **Vocational Service** projects? Examples are 4-Way Test contests, ethics programs, career days, mentoring... Did you do **Youth Service** programs? Examples are Interact, Rotaract, and other local youth programs... Did you utilize **District Grants** applied for and received to do service projects in your community?)

9. Because we are an **International Service** club, we also... (What International Service projects did you do? For example: Have you been active with Global Grants, Vocational Training Teams, Global Scholar programs, Youth Exchange, or Polio Plus...? Did you participate with other Rotary districts, clubs, or partners in International Service? Have you created innovative ways to serve and work from afar?)

10. Because we had the following **Fundraisers** that raise this amount of money: (Tell the name of the fundraiser and what the dollar amount raised per year)

PROJECTS:

DOLLARS RAISED:

	\$ _____/Yr
--	-------------

	\$ _____/Yr
--	-------------

	\$ _____/Yr
--	-------------

11. Because we raised the following funds for **The Rotary Foundation** (and if applicable, our Club Foundation or Endowment): *(For example, what percentage of members are Sustaining Members, Paul Harris Fellows, multiple PHF, Benefactors, Paul Harris Society, Bequest Society and Major Donors? What Annual Giving, Every Rotarian Every Year (EREY) and Endowment Fund levels are attained? How does the club support PolioPlus? *See **The Rotary Foundation** handout)*

The Rotary Foundation


If We Have a Local Club Foundation or Endowment *(example, with my club foundation or endowment we are funding scholarships, supporting a youth program or a food pantry...)*


RESOURCES AND FORMS:

Our IVFC Website <https://rivisionfacilitation.org/>

FAQ

Useful Links

 Facilitator Learning Demonstration Videos on [IVFC YouTube channel](#)

 Club Visioning [Facebook Group](#)

Work with your District Vision Facilitation Chair



Master Plan

Master Plan – (Where do we want to be?) Sample

Our 1st Ideas/Goal

Our 2nd Ideas/Goals:

Our 3rd Year Ideas/Goals:

Goals for the Year: Who will Lead: Goals for the Year: Who will Lead: Goals for the Year: Who will Lead:

1	Increase Youth services- Sponsor a RYLA student	Youth Services Chair	1	Increase Youth services- Exchange student		1	Increase Youth Services- add 2 nd scholarship	
2	Obtain 8 new members	Membership Committee	2	Obtain 8 new members		2	Obtain 8 new members	
3	Public image- let community know about our 3 yr plan	President Sue	3	Have community leaders attend weekly programs		3	Billboard to tell community what we accomplished	
4	Hold socials that include family	Joe/Cathy	4	Establish a Satellite club		4		
5	Send 3 people to District training	Tom	5	All board members attend one		5	Five members of club attend International	

Master Plan

Master Plan – (Where do we want to be?)



Design a multi-year coordinated plans for continuity, consistency and consensus

Place the ideas on the form to show the results of the Visioning to the club. Once the club approves, change the ideas to achievable goals.

Our 1st Ideas/Goals:

Our 2nd Ideas/Goals:

Our 3rd Year Idea/Goals:

Goals for the Year:

Who will Lead:

Goals for the Year:

Who will Lead:

Goals for the Year:

Who will Lead:

1			1			1		
2			2			2		
3			3			3		
4			4			4		
5			5			5		
6			6			6		
7			7			7		
8			8			8		

Develop a Master Plan from the Vision Template:

Some goals may be listed in all 3 years (either ongoing or Phase 1, Phase 2, etc.)

Each Goal will have an Action Plan (Who will do what by when?)

Use a separate Action Plan sheet for each of the goals

Goals may need to be adjusted as the plan unfolds

You will need to Monitor Progress (see Vision to Success Guide)

The Planning Process Questions:

Who are we?

Done

Where are we?

Done

Where do we want to be? **Master Plan**

How will we get there? Action Plans

How will we know we've arrived? Outcome Achieved

Action Plan

Develop an Action Plan for each goal on the Master Plan

- Try to list Actions/tasks in order, but be aware some new steps may become apparent
- Consider using an action verb (suggests movement)
- Break down bigger tasks into a list of smaller tasks if needed
- Be mindful of potential obstacles. List alternative ideas in comments
- Establish timelines to keep to encourage implementation
- Consider potential resources: funds needed, partners to involve, connections to make
- Describe the outcome to help know what completion is complete
- Recognize and celebrate accomplishments!

ACTION PLAN – (How will we get there? How will we know we’ve arrived?)

Execution: Who will do what by when?

GOAL:		Where do we want to be?				
Actions/Tasks (What has to happen?)	Who is in the Lead?	Who else will help?	Resources needed	Start Date	End Date	Comments/Status Report

OUTCOME		How will we know we’ve arrived?
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Develop an Action Plan from each goal on the Master Plan:

- Actions/Tasks - try to list in order, knowing that new steps may be apparent
- Actions/Tasks - consider using an action verb (suggests movement)
- Actions/Tasks - break down bigger tasks into a list of smaller tasks if needed
- Actions/Tasks - be mindful of potential obstacles. List alternative ideas
- Actions/Tasks - develop timeline
- Actions/Tasks - define resources, funds needed, partners to involve, connections to make
- Outcome - describe the outcome
- Outcome - monitor progress (see Vision to Success Guide)

The Planning Process Questions:

- Who are we? Done
- Where are we? Done
- Where do we want to be? Master Plan
- How will we get there? Action Plans
- How will we know we’ve arrived? Outcome

Action Plan Sample:

ACTION PLAN EXAMPLE– (Outlines **Who** will do **What** by **When** to accomplish the Goal)



Goal: Install playground equipment for disabled children in community park by June 2023

<i>Actions/Tasks (What has to happen?)</i>	<i>Who is in the Lead?</i>	<i>Who else will help?</i>	<i>Resources needed</i>	<i>Start Date</i>	<i>End Date</i>	<i>Comments/Status Report</i>
Contact the Parks Department	Club Service Chair		List of playground equipment needs	March 1, 2022	March 30, 2022	
Determine which playground equipment and cost for project	Club Service Chair		Equipment company phone #	April 1, 2022	April 30, 2022	
Gain project and funding approved by the Board	Club Service Chair	Treasurer, President	Quotes on equipment purchase	May 2022 Board meeting	May 2022 Board meeting	Ask the president to be on the agenda at the Board meeting
Determine fundraiser to help fund the project	Fundraising Chair	Club Service Chair	Fundraiser specifics	June 1, 2022	September 1, 2022	
Present the project and the fundraiser to the Club for support	Service Chair, Fundraising Chair	President, Program Chair	Project Overview and Fundraiser	June 1, 2022	July 1, 2022	
Conduct the fundraiser	Fundraising Chair	Club Members		June 1, 2022	September 1, 2022	
Use the funds raised to purchase the equipment	Service Chair	Treasurer		September 1, 2022	October 1, 2022	
Work with Parks Department to install the equipment	Service Chair	Service Committee	Tools for installation	April 1, 2023	April 30, 2023	Have the members help with the installation
Display a Rotary sign near the playground equipment	Public Image Chair		Material for the sign	April 1, 2023	April 30, 2023	
Conduct a ribbon cutting ceremony and invite the organizations whose children would use the equipment	Social Chair	Promotions Chair, Service Chair	Refreshments for the event	May 1, 2023	May 31, 2023	Use social media to promote the event and invite organizations who serve disabled youth

OUTCOME	<u>Happy children with and without disabilities playing on the playground equipment</u>	How will we know when done?
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Develop an Action Plan for each Goal on the Multiyear Plan:

- Actions/tasks – try to list in order, knowing that some new tasks may be added
- Actions/Tasks – be mindful of potential obstacles. List alternative ideas in comments

The Planning Process Questions:

- How will we get there?*
- How will we know done?*
- Action Plan*
- Outcome Achieved*

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 Present the Club Visioning event PowerPoint (*while everyone is eating*)
Includes Intro 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.
 - 7:50 – 8:00 Summarize verbally the 2-4 ideas in each Category using the above Rotary Action Plan priorities
 - 8:00 – 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 design an Action Plan. Have a group representative share summary of the results.
 - 8:40 – 9:00 Vision to Success: ask volunteers on Next Steps while Scribes capture on newsprint the names and dates for each of the six assignments on a flipchart or computer spreadsheet form.
- Closing questions/remarks and discuss observations to the extent that the group wishes, hand out/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 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)	Raises 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 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 idea (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 accomplishments 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.

Post Club Visioning Guide

Vision to Success Guide

(Includes: How will we get there? How will we know we've arrived?)

Here's where leadership really counts! Below are some elements to help encourage the plan to succeed beyond expectation this year and in the years to come!

Use the **Rotary Action Plan**, with the four areas of focus (**Increase Our Impact, Expand Our Reach, Enhance Participant Engagement, Increase Our Ability to Adapt**) to frame your club's success.

At the Visioning event, you looked at six next steps to help the club and its members move forward:

1. **Gather the list of top ideas you plan to move forward with**
2. **Create a Club Statement of Purpose or Motto**
3. **Establish a Process and then develop the Master Plan**
4. **Share Club Visioning results with your club**
5. **Choose a Club Impact Leaders or Club Impact Team**
6. **Create an Action Plan for each idea in the Master Plan**

Below is a guide to assist you with each next steps to help you move forward from Vision to Success:

- **Gather the list of ideas from the Visioning session that you plan to move forward with**
 - Generally, these would be the **top 2-4 items from each area of the voting**. Every club will be different in how many ideas the club chooses to move forward.
 - You will need to look through the ideas and decide which you would like to move forward into your 3 year Master plan.
 - You might also consider that there may have been some ideas that came up that were not top vote getters, but that should be added into your plan (such as club diversity was the idea, but "sub" ideas were 50/50 men/women, age diversity, club reflects community diversity).
 - Keep the entire list as you may wish to revisit it over the course of the three years.
- **Create a Club Vision Statement of Purpose or Motto**
 - Often this comes from these areas of the Writing Exercise:
What does your club stand for? What are your club attributes?
 - You assigned someone at the visioning session **to lead a group** to work on a motto, slogan, **statement** of purpose, or whatever it is that works for YOUR club culture.
 - Some clubs even have a competition with teams or individuals in the club, but eventually this should be something that club members embrace and allows them easily and quickly to answer the question: **What/Who is Rotary in YOUR community?**
- **Establish a Process and then develop the Master Plan**
 - Decide how and who will be a part of healthy discussions about what ideas that came out of the visioning that can be accomplished in year one, year two, and year three **PRIOR** to presenting the results to the general club members (so discussion and/or buy-in can occur when the results are presented to the club).
 - Group should include the **President Elect and Nominee** as the plan should continue to move forward in their leadership years.
 - Keep in mind that some of these ideas may be active in all three years (that is: phase 1, 2 and 3, or an ongoing effort, or start small and grow larger such as a fundraiser, etc)
 - Some of the ideas can be as simple as continuing and/or expanding existing programs or as bold as brand new projects, fundraisers, or innovative changes (such as family memberships or changing the meeting time). Each of these should still appear on your Master plan.

-The Master Plan is a guide to give members the idea of an **overall plan for three years** and then the Action Plans break down these ideas to manageable tasks. This process helps the club feel confident in goal attainment instead of being overwhelmed.

- **Share Club Visioning results with your club (use the CUSTOMIZABLE POWERPOINT)**

- Use the PowerPoint attached to fill in YOUR Visioning results, including a DRAFT of your Master Plan (others in the club may want to give input when they see this).

- Present this at a club meeting relatively soon after the Visioning event. A group of Rotarians who attended the Visioning event should be **involved** in the presentation (so the club does not see this as one person's version of the future).

- Ask for the Club's Commitment to the results:** Ask some of the same questions that you heard at the visioning session: What excites you about this? What does this mean for our club? What does this mean for our community? What is one thing we can do today (hopefully PLANNING is the answer)?

- When you present the results, you might consider having **sign-up sheets available** so that club members who are excited about a specific goal can sign up that day to participate.

- **Choose a Club Impact Leader or Club Impact Team**

- Consider a Club Impact Leader (or Team) that would be an individual who or committee that takes on the role of championing the goals (should be at least a couple people who were at the event, possibly incoming leaders of the club, maybe a newer, enthusiastic club member, etc)

- This Impact Leader or Impact Team has the task of **keeping the plan alive** and will not allow it to be set aside on the proverbial "shelf".

- While some Impact Leaders or Impact Teams will take a stronger role than others, it is important to have somebody or a team who would be willing to keep bringing up the question:

- How are we doing to move our plans forward?**

- Part of this role is simply to keep asking about, prodding, and nurturing the plan

- Ask your **Assistant Governor** to help with encouragement

- **Create an Action Plan for each idea in the Master Plan Column Year 1 (FORM attached)**

- Take the "idea" from the Master Plan and form an Achievable Goal for each idea you want to accomplish in the **first year**.

- Each goal should be realistic, measurable, and have a timeline stating "**who will do what by when.**"

- Each goal should have a separate Action Plan.

- The goal can be developed by an existing committee, an individual, a group of individuals, the board, who else? (keeping in mind that buy-in often is stronger if someone is part of developing the goal)

- Decide who will take each Goal and work to create the Action Plan

- The Action Plan states the tasks that must be accomplished in order to achieve the goal

- It asks for someone to be responsible for that goal

- It asks who will help with goal attainment

- It asks if any resources will be needed

- It asks for a beginning and ending date

- It also helps monitor progress in case changes need to be made

- See the Action Plan **template for assistance on development**

- **Track the progress and Outcomes Achieved!**

- Decide how/when you will revisit the Master Plan to start working on **year two ideas**

- Go through the same process as above for development of the goals and Action Plans for year two, and **eventually year three**.

- Encourage updates to the club members on year one goals so they know the Action Plans are moving forward
- RECOGNIZE those who are actively moving the Action Plans forward
- CELEBRATE progress by identifying milestones towards the Outcome

HOW TO KEEP THE PLAN ALIVE:

SOME THOUGHTS ABOUT HOW TO KEEP THE PLAN BUZZING, BOTH INSIDE THE CLUB AND OUT IN THE COMMUNITY BY EMPHASIZING WHAT IS HAPPENING AND WHAT IS COMING UP:

COMMUNICATION (IDEAS IN NO PARTICULAR ORDER):

- Social media (in and out)
- Press release: The Rotary Club of XXXX came together and here is what they want to accomplish in our community in the next 3 years. If you are interested, contact XXX (in and out). If your plan is relevant to your community, it becomes an attraction tool for others that want to accomplish the same thing.
- Club bulletin/website/special email updates (in club)
- Announcements from “Goal” chairs at meetings (in club)
- Board meetings (in club)
- Local “out of club” announcements/flyers (newspaper, city hall, churches, schools, anywhere locals gather to update them about what is happening) (out of club)
- Partners (other NGO’s, local government, schools, etc) who are or could have a vested interest in your goal attainment (in and out)
- What else works in YOUR community?

OTHER THOUGHTS

On occasion, (Quarterly? Annually?) restate your goals, dreams, vision, or what the future looks like to help re-engage current members and help add NEW members.

Think guidelines vs rules, enrollment/empowerment vs delegation, passion vs work. If members are as excited about the club accomplishing the goals as the club leadership is, it is far more likely to succeed.

Talk to other clubs. Do they have a guide to follow for something that your want to accomplish? Might they want to collaborate on a project that helps both clubs? Have they had similar challenges and a plan that helped them succeed?

Connect with District Vision Facilitation team if questions or concerns on how to proceed.

Engage your Assistant Governor as a resource and for support

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