

## General Vision Facilitation Process – D-5010

### Facilitation Team Coordinator (FTC):

The District Facilitation Team Coordinator or FTC **IS** the narrow spot in the hourglass between the district facilitation team and the club being facilitated. The FTC manages all aspects of schedule, preparation, and dissemination of electronic tools to optimize the vision event.

1. The FTC has communication with interested clubs discussing the parameters of expectation for facilitation. The FTC exchanges email and phone dialogue with the club Rotarian defined as that club's **Club Coordinator** to conclude interest.
2. 30+ days prior to the event, the FTC emails the Club Coordinator **03-FAQ's VISION FACILITATION and 04-Rotary Vision Facilitation – Club Needs** to prepare club leadership for the facilitation event.
3. The FTC and the D-5010 Visioning Facilitation Team exchange emails to determine potential dates for the event to be held over the coming 8 -12 weeks. The FTC concludes logical date options that the team can perform the club facilitation and distributes these options via email to the Club Coordinator.
4. Depending on the size of the Club, 10 ~ 20 members (absolute maximum of 25) will be recruited to participate in the event. Current officers, board members, and a representation of old and new members are encouraged to participate.
5. The Club Coordinator distributes date options to the participants and arrives at a facilitation date. The FTC confirms the date with the Facilitator Team.
6. 10+ days before the event, the FTC emails the first Survey Monkey link to the **06-Rotary Club Survey** to the Club Coordinator for distribution to all club members. The FTC monitors the progress with the Club Coordinator as the members submit their survey responses. Reminder emails to complete the survey are sent, as needed.
7. The Club Coordinator provides the FTC with current club statistics from Rotary Club Central on membership, giving and service.
8. 4-5 days before the event, the FTC emails the pdf fillable **07-Rotary Visioning Homework** to the Club Coordinator for distribution to the club members intending to be at the Visioning Session. Participants are instructed to bring it with them to the event.
9. The FTC compiles the Rotary Club Survey answers (through Survey Monkey) and prepares a scatter graph of the results for the Visioning Team to use in the PowerPoint presentation.
10. The FTC continues to follow through on event preparations with the Club Coordinator confirming the number in attendance, the location and direction to site as well as the readiness of the facility and food.

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**NOTE:** Each Vision Facilitation Team will designate a **Lead**. The lead will manage the team and the elements of facilitation including:

1. Identifying which team member will update the PowerPoint with club specific information.
2. Who will bring the laptop and projector?
3. Assign a team member to take pictures to capture the evening.
4. Assign the team members with the various roles of the facilitation....
  - a. Intro/Ice Breaker
  - b. PowerPoint presenter
  - c. "Extractor" – that person designated to draw out the various comments that the participants have written on their exercise.
  - d. Scribes of these comments
  - e. Facilitator of the Multi-Voting process (dot exercise)
  - f. Summarizer – draws conclusions for the club membership based on "key vote getters" on the various wall charts
  - g. Action Plan Facilitator – draws on a wall chart a 3-column graph to identify WHAT Action, WHO will "own" the action, and by WHEN will the Action be completed.
  - h. Closing Leader – the person that will facilitate the closing comments by each of the team members.
5. Identify a team member to follow-up with the club in 3 months, 6 months, and 1 year.

### **Facilitator Qualifications:**

Our District 5010 has 3 levels of facilitators:

**Expert** - Is comfortable and qualified to facilitate a planning event, understands any aspect of the process and has the Rotary experience to interpret the collected data in "Rotary speak".

**Intermediate** - Is comfortable and qualified to facilitate some aspects of the process but still may not know Rotary as well or wants more practice.

**Novice** - In the learning phase of the process but still may not know Rotary and/or have consulting skills.

### **Why would a club initiate a Vision Facilitation?**

The ultimate goal of this event is to take everyone's independent thinking and perspectives on a variety of topics, collect the information in an open forum for sharing and then vote on these to determine the consensus focus of the group for moving forward in a tactical way.

This arms club leadership with the objectives the club members wish to focus on for the future and the three to four key goals for the current year. It is easier to populate committees and recruit new members when consensus abounds!

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### **Steps and Instructions for the Facilitators of the 2.5 hour Vision Facilitation:**

- 1. Open the session:** Identify the Rotary-related experience level of all participants gathered for the facilitation. Consider saying: "I'd like to conduct a tenure check among all of you. By a show of hands, we just want to know how long each of you has been involved in Rotary. Everyone that has been in Rotary over 20 years, raise their hands. 10 years? 5 years? Less than 3 years? Past presidents?"

Based on the responses, you will be able to:

- Discern how "deep" individual experiences are
- Vary any subsequent explanations and examples of Rotary programs or activities to match the experience level of those present
- Identify the most experienced members for any counsel and advice they can bring to the requisite Action Plans that later conclude the session.

- 2. Brief introduction of Facilitators:** Club, Rotary experience...

- 3. PowerPoint Presentation:** Go over the PowerPoint while they are eating.

Review the notes under each of the .ppt slides in the presentation deck. This will provide an overview of intent for each of the slides.

- 4. Data Collection and Scribing:**

The next part will be the extraction and scribing of the ideas from the Rotary Visioning Homework that each participant completed before the session. You will not ask them to prioritize anything at this point nor to turn in the homework. The homework is for their reference only.

Collect the ideas on the flip charts ONE QUESTION at a time. The scribes will put a heading on the top of the flip chart for the area you are collecting. In other words, the first flip chart (place a #1 in the upper righthand corner) will be titled "Member Attraction, Retention, Sponsorship and Orientation".

The facilitator will extract ideas from the participants in the room under each question.

Keep filling in the flip charts with headers and numbers until you have captured everything from the homework exercise. The purpose of the homework exercise is to have each member INDEPENDENTLY write down their perspective of their club. Once you have gathered the feedback on the flip charts, the homework exercises can be thrown away or the respondents may keep them.

Remember to instruct the group to only speak one at a time and to respect the response of the individual talking. The process of drawing out the feedback will mean that the facilitator is first trying to grab the concept in the least number of words and then the scribes are writing them on the flip charts.

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When your club members get excited about certain subjects they will start talking quickly and on top of one another...the facilitator **MUST** manage so the scribes have a "writing" chance.

During the writing exercise (while the club is busy) prepare about 20 (10 on each) 3M Post-It Wall chart sheets on each for the scribing portion. Each sheet should have the crossed lines and be numbered alternating from one easel to the other as represented in Figure 1.

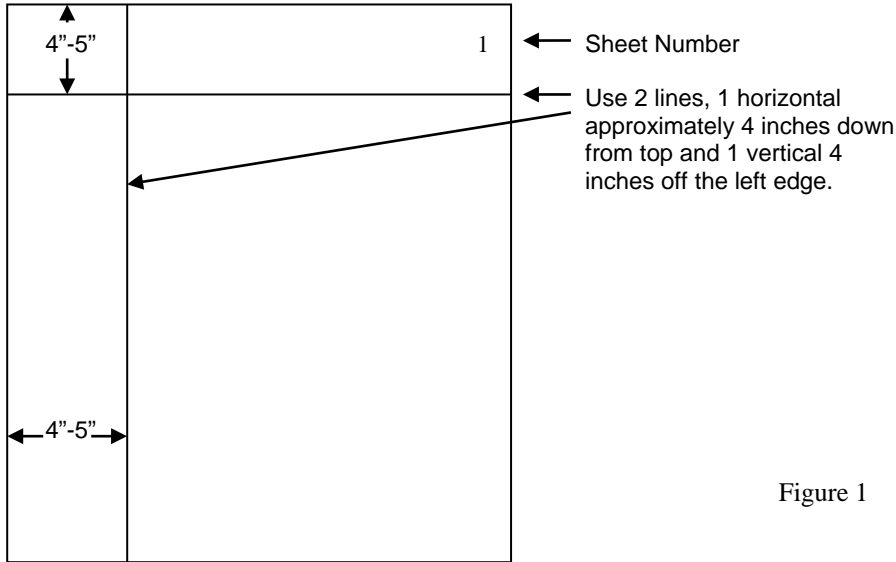
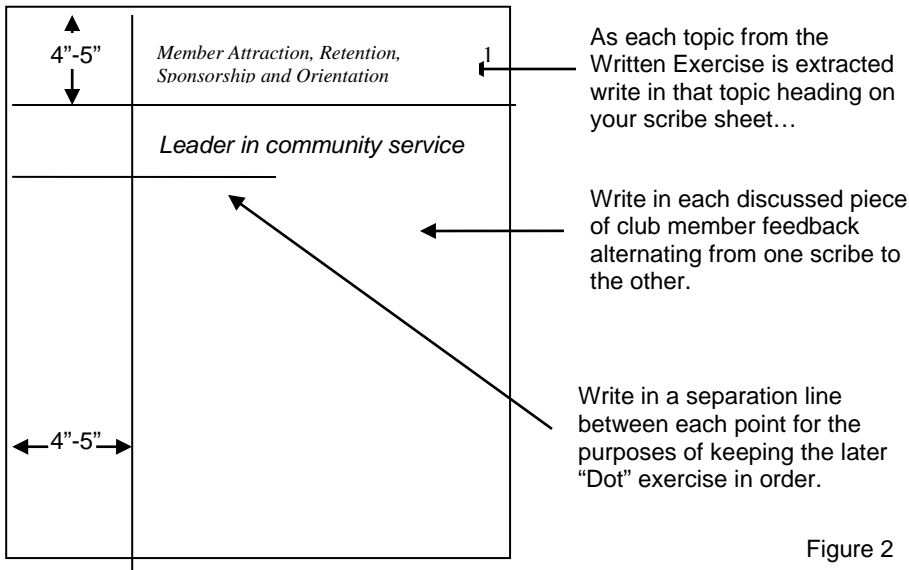


Figure 1



Consolidate any duplicates in a category (or when we are gathering the original feedback just note that "the response is similar to this earlier one, are you OK with that?")

Figure 2

### Give em a break...

Scribes...divide up the flip charts on the walls into the categories of the exercise.

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### 5. Multi-Voting “Dot Exercise”:

Distribute the 24 blue dots for voting (each participant receives one sheet of dots).

Following the first round (blue round) of voting the scribes will take their markers and X out the voting square adjoining any statements that received few or no votes.

Then distribute 3 red dots to each participate for the second round of voting instructing that they may only vote on topics that have not been crossed out after the first round.

The reason for the second round of dots is that we eliminate all statements that received few or no dots on the first round. This process tends to narrow focus for the future of the club.

Guiding principles proposed for the Multi-voting exercise:

- In the synthesis look for options/ideas that might be combined or blended
- Discourage “stacking” dots on a single idea.

**6. Drawing Conclusions from the Data:** The ULTIMATE objective of this 2 ½ hour Vision Facilitation is to take clubs that have gotten so diverse in their beliefs and practices that they are "rudderless" to a focused consensus on the top 3 to 4 goals for the next year. Ideas with fewer dots will be goals that can be focused on in future years.

**7. Strategic Priorities:** The top 3 to 4 strategic priorities are identified based on the results of the second round of voting and an action plan created for each priority:

For each of the top three to four strategic priorities:

Strategic Priority	Timeline	Resources Needed	Member(s) Assigned
1.			
2.			
3.			

**8. Club Action Plan Process:** To conclude the Vision Facilitation, the results of the session should be shared with other club members and monitored:

ACTION	WHO	WHEN
1. Compile the facilitation wall charts	John, our club secretary	2 weeks using the facilitation team provided Excel template
2. Set a Club Assembly to present and discuss findings with the rest of our club	President Steve	Upcoming Quarterly Club Assembly in 5 weeks
3. Identify a member to track the progress of each goal	Mike	Monthly

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### 9. Closing Comments:

It was a real pleasure to work with each of you this evening....

- ❖ This (name) Rotary Club team has accomplished a tremendous amount tonight.
- ❖ In less than 3 hours you brainstormed and reached consensus on a set of priorities for near and long-term action in each of the club's service areas
- ❖ It can, and should be,
  - a platform for communicating with the whole club about the work you have done here,
  - clear goals for the current Rotary year
  - and a way to help insure continuity and consistency of focus and action out into the future
- ❖ So, to sustain the momentum you have generated tonight, President (name)...what can you share with us about
  - Next steps you expect to have the club undertake
  - Who do you expect have take the leading in fostering those actions
  - Your sense of the time line for those steps
  - How you intend to keep those action items visible, viable and being worked on for both the current action plans that you'll create and the long-term strategic focus

#### ***As we close this session, let me ask you two questions:***

- What doubts, worries, concerns, or reservations do you have about this evening's discussion of strategy and action? [Listen to responses]
- What excites or energizes most about this evening's discussion of strategy and action?" [Listen and affirm responses]
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#### ***Feedback Survey:***

You will receive an email in the next 24 hours linking to a 2-minute survey asking your opinion about this Visioning event. We appreciate your candid feedback.

Thanks for letting us be a part of your future... 😊

***“The all of us is smarter than the one of us.”***