



Rotary D-5010 Visioning Team Club Facilitation Overview – Leader Version

- 1. Desired Number of Participants:** 10 – 20 including past and future club presidents, board members and newer members. **PLEASE** ask participants to be on time as the process is sequential...thank you.
- 2. Typical Facilitation Time-line: 4:30pm (set-up) to 8:00pm (conclusion)**
Participant **club members arrive at 5:15** to begin by 5:30 and can expect to conclude around 8:00.
- 3. Room Set-up:**
U – shaped set-up of tables and chairs facing a screen with an easel on either side of the screen. Water and glasses on the tables as well. Please allow enough room along the walls to allow for 20-30 sheets of easel paper to be hung on the wall for the exercises.
- 4. Food Buffet/Box Supper:** Starts at 5:15 with all participants seated and eating by 5:30.
- 5. Needs List:**
 - Provided by Participating Club**
 - Meals for all attendees and facilitators...we suggest a box supper or a light buffet sandwich line to expedite food service and minimize clean-up.
NOTE: Although alcoholic beverages add to the evening, our experience indicates it extends the timing for the event well beyond our suggested timeline for all participants and facilitators.
 - Table name cards with attendee names printed large on the cards
 - 2 full sized **Post-It** Easel Pads
 - Projector and Screen
 - Ext. Cord w/ multiple plug in
 - Pens for each participant
 - Provided by Facilitators**
 - Rotary Club Survey for completion by all club members prior to facilitation via Survey Monkey
 - Visioning Exercise for completion by participants prior to facilitation
 - Lap-top with PowerPoint Presentation on it
 - 500 – Color Code Label Dots (3/4” in diameter sized) – Blue (24 x # participants)
 - 75– Color Code Label Dots (3/4” in diameter sized) – Red (3 x # participants)
 - Variety of blunt “permanent” Colored Markers
 - 2 easels
- 6. Cost to the Participating Club:**
\$200 to help offsite the cost of facilitator travel to those clubs in the district that are not on the road system. Home hosting for facilitators (if needed).

Time Line for Event:

1. The Rotary Club will identify a “**Club Coordinator**” that will coordinate the event.
2. The District Vision Facilitation Team Coordinator will establish contact with the Club Coordinator to **set the date for the facilitation event.**
3. Rotary Vision Facilitation – Club Needs and FAQ documents **emailed 30+ days** prior to the event to the Club Coordinator to understand the process and determine the timing of the event.
4. Club is encouraged to have Rotary Club Central as up to date as possible before the Event. At least **1-week** prior to the event, club statistics from Rotary Club Central are downloaded by the Club Coordinator and sent to the Facilitation Team Coordinator.
5. The Club Coordinator emails a link to the Rotary Club Survey (provided by the Facilitation Team Coordinator) to all club members **10+ days** preceding facilitation.
6. Rotary Club Survey results are summarized by the Facilitator Team Coordinator.
7. Rotary Visioning Homework is provided to the Club Coordinator to email out **4 to 5 days** in advance of the visioning session for participants to complete in preparation for the event.
8. The Club Coordinator will supply Vision Team Coordinator with details and directions to the site of the facilitation at least **1-week** prior to the Vision event to distribute to facilitators.
9. **The Event – Preparation:** The Club Coordinator will have the room set up, food procured and the list of facilitation “tools” ready for the facilitation team’s arrival.
10. **The Event – Timeline:**
 - 4:30 – 5:00 Arrival of facilitation team and set-up
 - 5:15 – 5:30 Arrival of participants; seated with meal and table tents in place
 - 5:30 – 5:40 Introduction of Facilitation Team. Group intro of Rotary club members (*time in Rotary; current/past roles in Rotary*); review rules of the Facilitation
 - 5:40 – 5:55 PowerPoint (while everyone is eating); **results from electronic survey**
 - 5:55 – 6:00 Clean-up meal mess/bathroom break
 - 6:00 – 7:00 Extract ideas from Vision Exercise completed by participants prior to event
 - 7:00 – 7:15 Round 1 - Dot prioritization on ideas under Vision 10 topics (**24 Blue Dots**)

Break when Round 1 of voting is completed
 - Round 2 - Dot prioritization for top three ideas-set strategic priorities (**3 Red Dots**)
 - 7:15 – 7:55 Select top **3** strategic priorities. For each priority: identify tactics and actions; assign ownership, timeframe, and resources to implement
 - 7:55 – 8:00 Wrap-up, feedback survey, thank you

A. Members and Engagement

1. Member Attraction, Retention, Sponsorship and Orientation
2. Membership Participation in Club Activities
3. Leadership Development (club and district level)
4. Club Meeting (agenda and programs)
5. Rotary Fellowship Participation (Firesides, Socials, Fellowships, and Networking Opportunities)
6. Club Public Image

B. The Rotary Foundation

7. Support for the Annual Fund and EndPolioNow

C. Service *(may be split into separate categories for large clubs)*

8. Community, Vocational, and International Service Projects

D. Next Gen *(may be split into separate categories for large clubs)*

9. Rotaract (Young Adults 18 ~ 30), Interact (High School), Youth Exchange program (High School), and RYLA Involvement (High School)

E. Fundraising

10. Club Fundraising

Closing Remarks:

- *This (name) Rotary Club team has accomplished a tremendous amount tonight.*
- *In about 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,*
 - *what it means as a platform for short and long term strategic and action plans*
 - *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** you most about this evening's discussion of strategy and action? *[Listen and affirm responses]*

Network with Rotarians over a cold one... 😊