**District 5060 Club Vision Facilitation**

**Strategic Planning Process**

**WHAT IS A “VISION FACILITATION?”**

District 5060 is participating in a Multi-District Program to provide clubs a Facilitated Strategic Planning Session. Current Leadership of the program includes District Vision Facilitation Chair Pete Erickson, PDG [perickson@nctv.com](mailto:perickson@nctv.com) 509-766-0475.

**WHAT IS A “VISION FACILITATION”**

* District 5060 is participating in a Multi-District Program to provide clubs with a Facilitated Strategic Planning Session. The Club Vision Facilitation program was developed by District 5960 Past District Governors Cathy Smith and Steve Wilcox, a professional consultant. It has been completed at over 85 clubs in five districts and is now spreading around the Rotary world. About 2/3 of the clubs in our district have completed the process since 2011.
* Clubs that choose to participate will commit an evening (5-9) or a Saturday session with a minimum of 9 to 12 members in attendance. This minimum is based on club size. See item #3 below.
* During this session, the club members are guided through a process to identify what they envision their club will look like in five years, with specific goals in every aspect of a healthy Rotary Club, and define actions to present the plan information at a Club Assembly.
* Clubs that have participated in a Vision Facilitation have noted improvements in membership, member involvement and project development. The program is conducted by three trained facilitators who guide the club to define their vision.
* The facilitation session is intended for all interested Rotarians in your club—from your newest member to your most tenured. The breadth and depth of the facilitation exercise is optimized when club leaders (past, present and future) and member opinion leaders participate.

**HOW DOES IT WORK?**

**Our District 5060 volunteer Vision Facilitation teams typically commit 15-20 hours of volunteer time to each event and therefore expect the following:**

1. Attendance at the event by present board members, the current president, president elect, president elect nominee, immediate past president and two past presidents, as well as newer and also experienced club members. Their collective involvement is essential to the success of the program.
2. Participants **must** commit to the entire 4 hour exercise.
3. The number of Rotarians committed to a session will be no less than 12 for smaller clubs but no more than 25 (to maintain the time schedule and allow fair and full input from all present). For clubs over 40 members, our team expects attendance to be between 20 and 25. For clubs over 80, we expect 25 members in attendance.

**Note: Given that the Facilitation Team is volunteering their time and traveling to visit your club, the team has latitude to reschedule should the above criteria not be met.**

Your contact for questions or to begin the process is Vision Facilitation Chair Pete Erickson [perickson@nctv.com](mailto:perickson@nctv.com) 509-766-0475.

**WHAT IS THE CLUB CONTRIBUTION?**

Each club requesting a Vision Facilitation will designate an “Event Coordinator to work closely with the District Vision Facilitation Coordinator, providing all the information and direction individual Rotarians will need in preparation for the session.

The Club will choose the location of their choice for the facilitation session. The Club Coordinator is responsible for arranging for the facility including the room setup. We do ask that a meal be served due to the length of the session and this cost is the responsibility of the club. The team provides materials which include easels and Post-It tablets at a cost of **$50** to the club. The Club Coordinator makes arrangements for the payment of this materials fee.

During the Vision Facilitation session, a team of facilitators will lead a process consisting of an overview presentation, a writing exercise, data collection, consensus voting, summary and action plan development.

**WHAT WILL THE CLUB GAIN?**

There are at least three measures of success for clubs that complete Vision Facilitation:

1. An immediate measure of progress is the members’ pledge and willingness to move the planning process from nice-to-do concept to meaningful growth programs for the club, its members, and its community.
2. Secondly, the input from the session is woven into the annual plans of the incoming and succeeding Presidents. It will be reflected in the continuity and consistency of programming and leadership in your Club.
3. The long-term mark of accomplishment will be at the end of five years when your club advances from where it is to where it wants to be.