



Rotary District 7010 Club Strategic Planning Facilitation

Desired number of participants:

Club members including past, current and future presidents, board members and members who are both seasoned and new. It is important that we follow the agenda and that participants stay throughout the entire session as it is sequential. The process is flexible and we can accommodate 15 – 40 participants

Standard Facilitation Time:

- Health Check – up to 3 hours
- Strategic Planning Session – up to 3 hours

Room Set Up

- For smaller groups, under 15, a U –shaped set up of tables and chairs facing 2 flip charts
- For larger groups, over 15, round tables accommodating 6 – 8 people.
- Allow enough room along the walls for 15 - 20 sheets of chart paper

Needs:

Provided by Participating Club:

- 2 easels with full sized chart paper
- 400 – colour code label dots (3/4”) – dark blue
- 400 – colour code label dots (3/4”) – red
- Blunt permanent markers (3 or 4 colours)
- Scissors
- Pens for all participants
- Painters/Masking tape

Provided by Facilitators:

- Rotary Strategic Planning Health Check provided to club prior to facilitation
- Rotary Strategic Planning Exercise provided to club within a week of the facilitation. This exercise is actually conducted during the session.
- Evaluation form.

Sample Time Line and Responsibilities

1. Participating Rotary Club identifies a “Club Coordinator” to act as liaison with facilitators and do pre planning and oversee exercise.
 - a. Set date and co-ordinate venue, food, materials etc.
 - b. Provide participants (and other club members if desired) with Rotary Club Health Check at least 7 days in advance. This document is used as the discussion tool for Part I of the Club’s Strategic Planning Process. The purpose of the Health Check is to provide insight for participants into their thoughts and feelings about the work of the club, the club’s areas of strength and areas of potential growth and focus.
 - c. Provide participants the Strategic Planning Exercise seven (7) days in advance of the session. This tool is used as the discussion paper for the creation of the Club’s Strategic Plan.

2. Facilitators will
 - a. Provide Rotary Club Health Check at least 14 days in advance of session.
 - b. Provide Strategic Planning Exercise at least 14 days in advance of session

COSTS:

While the District will cover all costs for the facilitation, Clubs are asked to financially contribute to the costs of operating the Club Strategic Planning Process at the rate of \$5 per member up to \$250. This is for sessions booked after October 1, 2017.