

Explanation of the Club Vision to Plan Process

Congratulations! You have gone through a couple of the first steps...

Process Step 1: The Rotary Vision Questionnaire (See Document “RVQ”)

Process Step 2: The Vision Facilitation Event

You are now on your way toward creating a long range plan for your Rotary Club, which will create an opportunity for great impact on your community, your Rotarians, and likely on communities in other parts of the world. You are in the first stages of having a greater impact on humanity and creating a legacy for your club and Rotarians.

We mentioned at the close of the event that once you have a Vision, it creates the foundation for a long range plan. We have created a narrative and process flow documents to assist you with the steps that are needed to create a long range plan, break that down into committee goals, and break down those goals into actions (who will do what by when). We have also shared some suggested structures and best practices to accomplish it all. Keep in mind, your Vision to Plan is a 3-5 year process of continuous improvement.

How to Read the Process Wheels (see pages 5 to 8)

The Club Vision to Plan Process Wheels should help guide you through your three year planning cycle. The steps are the same on all 4 wheels, but they each share a different perspective.

- 1) Process – a simple overview of the steps
- 2) Outcomes – (what do we get) – what plans, documents, information comes out of each step.
- 3) Ownership (by who) – who should be involved in each step
- 4) Timeline (by when) – suggested timelines for each step

By looking at all 4 process wheels you can identify a specific process, outcome, ownership and timeline for each of the 8 steps. This example shows you step 5:

- 1) Process - Club Builds out a long Range Plan Document (strategic Initiatives)
- 2) Outcomes (what do we get) - The focus areas from the Visioning Session are transferred to a simple long range planning spreadsheet to ensure the priorities for the next 3 years are well documented and committees begin to work with these new strategic initiatives.
- 3) Ownership (by who) - Committees meet to fill in the long range/strategic initiative spreadsheet using identified focus areas from the Visioning Session. The Vision Champion, or someone to be named, collects and collates committee work which becomes the Club's long rang plan.
- 4) Timeline (by when) - The Club identifies committees to continue the work begun at the Visioning Event creating a multi-year, prioritized plan based on the focus areas found on the wall charts. Allow 2 – 6 weeks for the committees to draft the spreadsheet document.

Process Step 2: *So, where to begin...* At the end of your Visioning Event (Step 2 in the Club Vision to Plan Process Wheel), volunteers offered to get your Club started with the following:

- 1) Who will record the wall charts?
- 2) Who will draft the vision/mission/elevator speech?
- 3) Who will call the Club Assembly?
- 4) Will you start or discuss a President's Development Council?
- 5) Who will be the Club Vision Champion?

Once you have recorded the Wall Charts (See Document "Wall Sheet All Ideas Summary) onto the excel spreadsheet, you can now copy to a second sheet and remove all of the items except the top 3-4 in each category. These become your Club's focus areas (See Document "Wall Sheet Focus Areas") on which you will concentrate and develop your plans.

Process Step 3: The focus areas will assist the committee that is working on the Mission/Purpose Statement/Elevator speech to create a draft for the club to approve, or continue to work from until it "fits" the club (See Document "Definitions"). These are definitions which will help this writing committee make recommendations on what best fits their club. As we often say, many times the Mission/Purpose Statement/Elevator Speech comes significantly from sections 1-2 of the writing exercise.

Process Step 4: At this point, you will also be scheduling a Club assembly to share the outcomes from the Club Visioning Event and the draft Vision/Mission/Elevator speech. Though every club will do this in a different manner, there are several sample power points (See Folder "Sample Club Assembly Vision Event Presentations) that can be utilized to share the information from the Visioning event. Many of these samples share the basic concepts of why planning is so critical to the success of a Rotary club, but also leave the flexibility to share the information that has been generated specifically by your club.

Process Step 5: The balance of the writing exercise focus areas (numbered 3-8) will be transferred to another document to begin the more formal Long Range Plan (Club Strategic Initiatives). Thus begins the Plan Development stage, creating a multi-year plan for each focus area voted on by the club (See Document "Sample Vision to Plan Build Out" – note there are 3 tabs within this excel document). It is suggested that each focus area be transferred to a copy of this document and handed out to the appropriate committees to lay out a multi-year plan. Though every club will be different, here are some thoughts:

- 1) Avenue of Service chairs might consider oversight of the focus areas in their area.
- 2) All should be reminded that the Long Range Plan is a broad view of what should be accomplished in each of the next 3 (or 5) years. It will be broken down into actions and tasks in a later step.

- 3) Each committee's spreadsheet for their specific focus area should be collected by the Club Vision Champion (or someone to be named) to be collated into one document, which becomes the Club's Long Range Plan (Or some consider this to be a Strategic Initiatives document).
- 4) Once you have approved the Long Range Plan, consider how you will share this with the community. If the plan is relevant and fits the needs of your locale, it becomes a recruiting opportunity and you should consider sharing it with other members of the community (See folder "Sample Strategic Plans"). Consider sharing your Long Range Plan with your Assistant Governor and District Governor. They likely will be aware of resources that may be available to help you accomplish your plan.
- 5) If the Club prefers a more formal presentation of the long range focus areas, the final spreadsheet can be revised and transferred to a written-paragraph type format, a brochure, or an electronic presentation tool for communication purposes.

Process Step 6: The next step would be for the long range committee goals to be broken down into annual actions, including specific tasks (what needs to be done by who and by when). The annual actions should align with your club's long range goals so the spreadsheet developed in Step 5 is the reference point from which actions will be identified. For each long range goal, ask yourself: "What is it that we need to do in the next year in order to get closer to reaching this long range focus?" Though every club will be different, here are some thoughts:

- 1) Consider how to involve all members in the annual goal planning.
- 2) Consider SMART goals to assure that they are reasonable and can realistically be accomplished during the year. List the specific tasks and actions that will be required to accomplish each goal, including each task which need to be done by when (See Document "Developing SMART Goals").
- 3) Think about how you will keep your club informed of progress that is being made in the various focus areas. Possibly an announcement by one focus area each week? Possibly the power point that was used at the initial Club Assembly can be updated and presented once a month?
- 4) If you prefer some other format for presentation purposes then transfer the information out of the spreadsheet format we offer here to whatever communication form you wish (Again, see folder "Sample Strategic Plans").
- 5) Once you have set your goals and tasks, consider how you will share this with the community. If the plan is relevant and fits the needs of your locale, it becomes a recruiting opportunity and you should consider sharing it with other members of the community.
- 6) Consider sharing your Annual Goals and Action Plan with your Assistant Governor and District Governor. They likely will be aware of resources that may be available to help you accomplish your plan.

Process Step 7: Once you are underway with your Plan, you will need to establish a process of review and follow-up, along with a reporting mechanism, to your club members, to the District, and to your community. Create a checklist of actions completed, measurements (dollars, % of goal, metrics, etc) to be reached by projected timelines (setting up

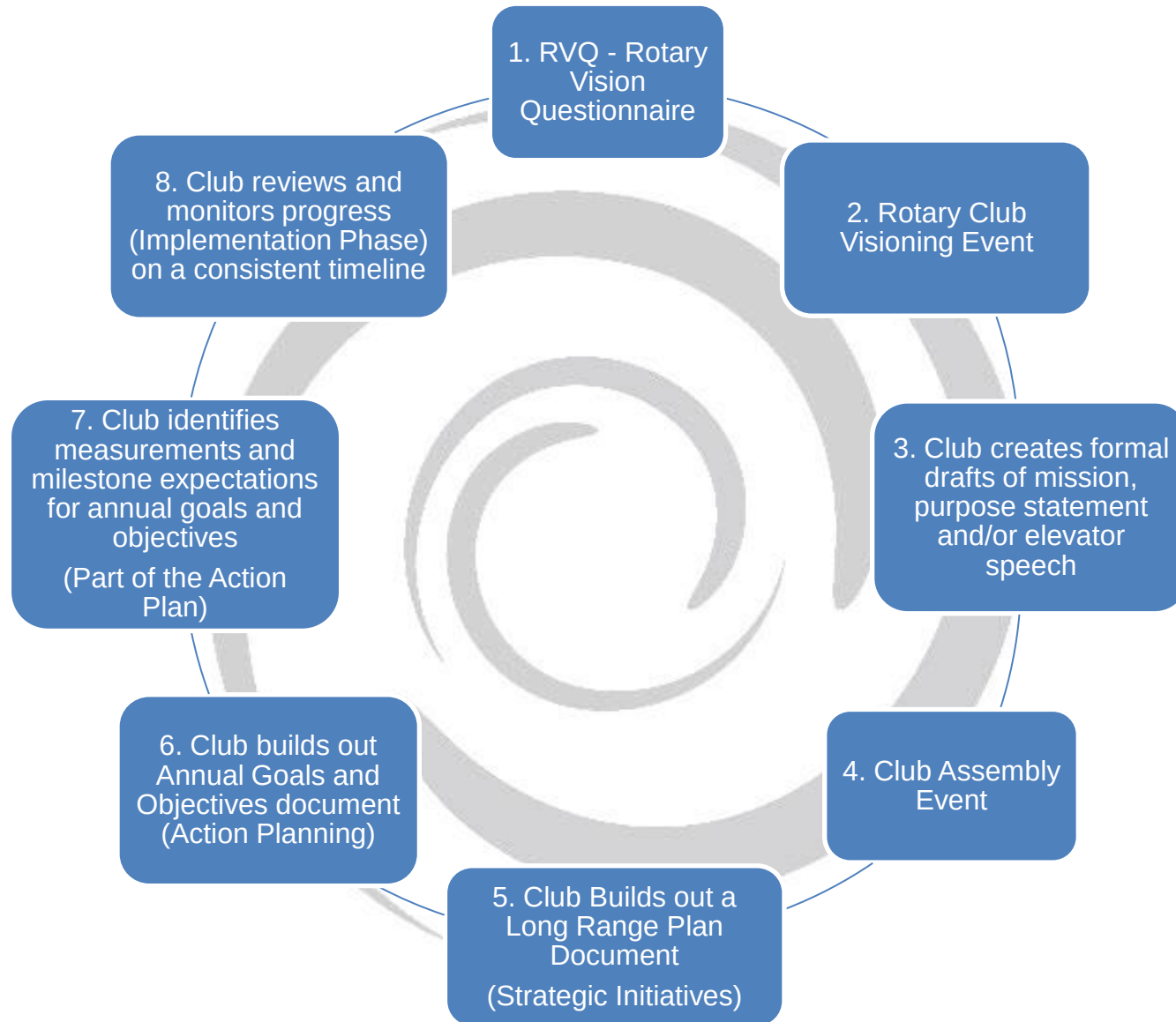
milestones and progress checks). Remember that as you complete various steps along the way, it is important to recognize those that have done the work and celebrate your successes.

Process Step 8: And you thought developing and documenting a long range plan was a challenge? Now that you have come this far, you should be proud of the fact that your club has a vision, a long range plan as well as specified actions that support this plan. The greatest challenge, however, is yet to come. You are now in the implementation phase. For the next 3 years your club members and committees are going to work through the list of actions following the identified timelines, checking off one task, one action at a time. During the next 1-3 years, your club members will need someone who will be key to monitoring progress, reminding individuals about the actions that should be implemented, and reporting and celebrating that which gets accomplished. Though every club will be different, here are some thoughts:

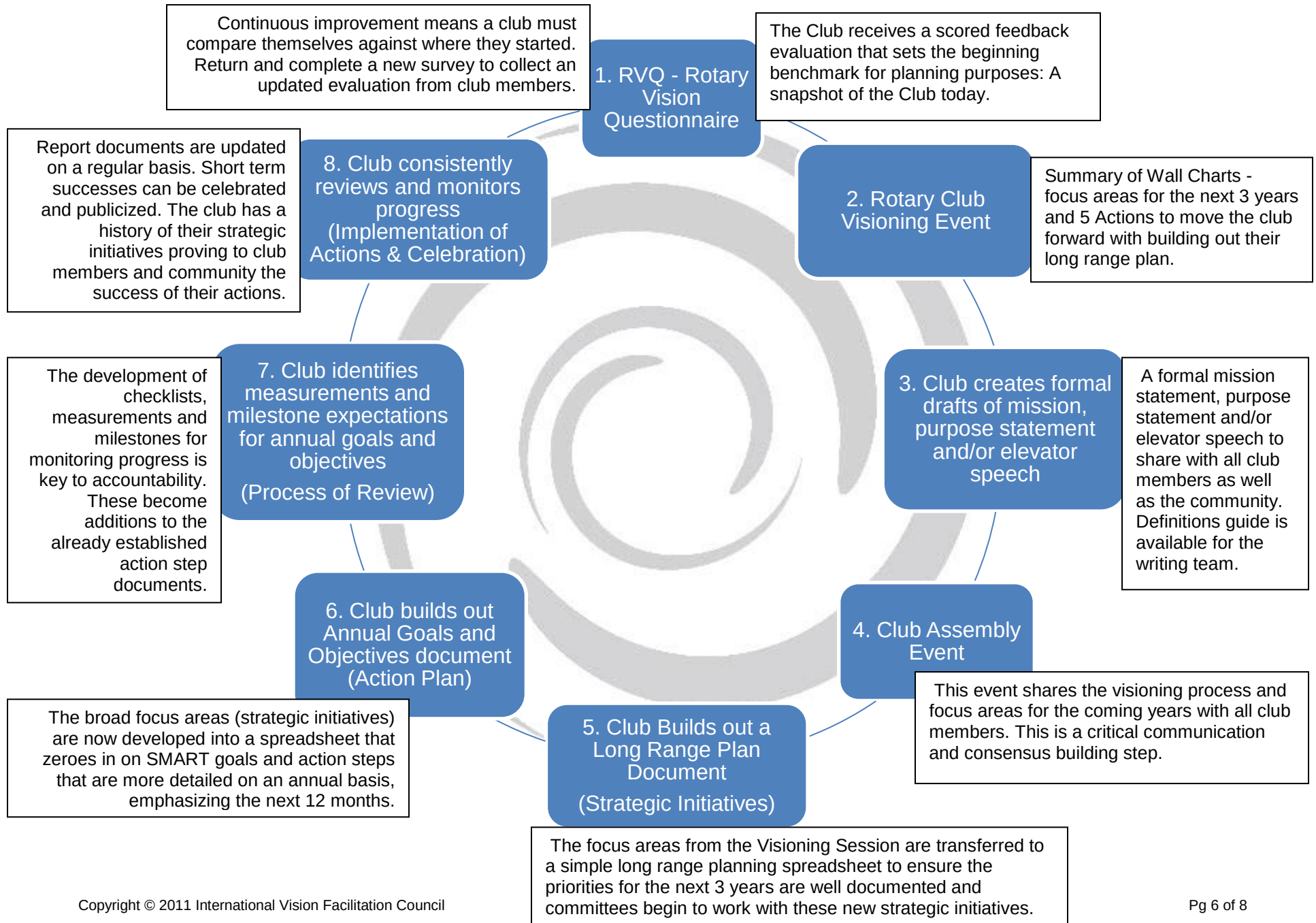
- 1) Consider the **Club Vision Champion** or another individual to be identified as the oversight director.
- 2) Consider **defining a method of reporting** that will become a part of every board meeting.
- 3) Consider a **dashboard or scorecard** document to share results and progress.
- 4) Consider a **communications plan** for sharing results and progress with all members and the community.
- 5) Consider **who will send updates** (and how often) to the District. This is where the AG may become a valuable partner in this process.
- 6) Celebrate the **actions that will be accomplished**. Do not wait until the very end of 3 years to consider your club a “success”. Every action completed is moving your club forward. These need to be acknowledged as you go building momentum, energy and support for these long range initiatives. Club cheerleaders are helpful.

Returning to Process Step 1: As you near year 3 and potential completion of your long range plan, consider deploying the Club Vision Questionnaire (RVQ) to your members again to compare against the initial RVQ baseline. By doing so, you are also able to monitor and measure improvements and/or areas that still need work. Gaps can be identified through this comparison. This would be an opportune time to consider scheduling another Club visioning event as well, to restart the cycle of success in your club.

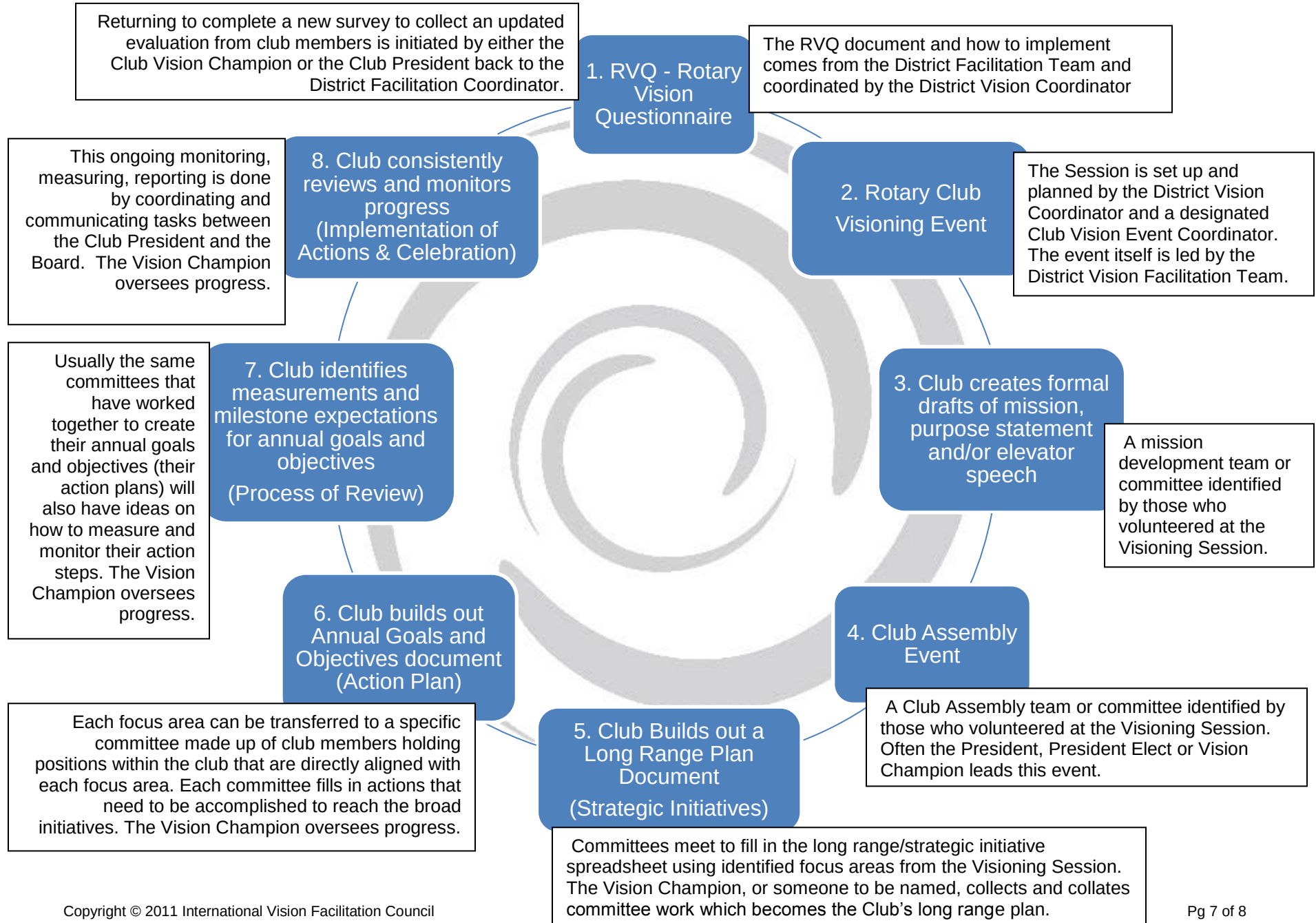
IVFC's Club Vision to Plan Process



IVFC's Club Vision to Plan Outcomes (What Do We Get?)



IVFC's Club Vision to Plan Ownership – Who Leads Each Step?



IVFC's Club Vision to Plan Timeline (By When)

