

DISTRICT 7780 VISION FACILITATION BEST PRACTICES

Based on comments from facilitators after 24 visioning events

January 26, 2014 (ALH)

PREPARING FOR THE EVENT:

Lead Facilitator

- Use the Lead Facilitators Responsibilities checklist to plan for the event.
- Review this Best Practices list for help in planning.
- Communicate with team by e-mail prior to the event to assign roles and disseminate the specific agenda (using internal agenda form) with timeline and other relevant information.
- Communicate with District Vision Facilitation Coordinator and Club Coordinator regarding room set up, materials, and other logistics before meeting.
- Talk to Club President about the Club Action Plan that will be discussed at the end of the visioning event and give the president a chance to think about whom he would like to see in those positions. (Don't let it be a surprise that night.)
- Be sure Club members are informed that the Vision Facilitation event is NOT a Club meeting.
- Assign one facilitator to take pictures for district and club PR purposes.
- The Lead Facilitator must have a timekeeper to log progress on the internal agenda during the event, also include a record of the number of participants and the number of Members.
- Arrange to bring materials to the event, including writing exercise, flip charts and supply kit, evaluation forms, the tool kit, copies of the club survey to give to the president and champion after the meeting, and wall chart summary. (Survey may be also emailed to club after the event.)

All Facilitators

- Review the internal agenda and your facilitator manual to ensure that you understand your role.
- Review club's website and Rotary Vision Questionnaire summary before event to get a sense of the club message and to learn who they are and what they have done—strengths and weaknesses.
- The Facilitation Team must act as facilitators, not as critics or coaches.
- When possible, if a first time facilitator, practice role-playing with others prior to event.
- Business casual is the dress requirement for all members of the Facilitation Team.

DAY OF EVENT SET UP

- Place the facilitation team's worktable behind the "U", so that team activities do not distract.
- Place screen for the PowerPoint to ensure that the presentation is visible to all.
- Place easels as close to the participants as practical.
- Make sure that the seating arrangement allows room for all to have enough space to be comfortable for the writing exercise and to circulate for voting.
- All facilitators should arrive one hour before the event begins to assist in set up
- Wear stick-on nametags found in the supply kit.

- One facilitator should greet the participants and help prepare participant name cards. (Write names in large block letters for easy viewing.)
- Create and post a *parking lot* wall sheet for recording off-target ideas.
- Create a Club Action Plan wall chart template for use at the end.

VISION FACILITATION EVENT—WELCOME AND START THE MEETING:

- Facilitators should eat at the worktable. The Facilitation Team must not be seated with the participants.
- The Facilitation Team must remain focused on the process until the closing is finished.
- List team member names on a wall sheet and post for all to see.
- Make brief self-intros of facilitator team at start of event— introductions include club, present/past Rotary positions, number of years in Rotary.

RULES OF THE ROOM, OPENING STATEMENT/CLUB MEMBER INTRODUCTIONS

- Explain “Rules” from wall chart, posted for all to see. **Emphasize** no cell phone, iPads, etc. If a participant must take a call, that person must be asked to **PLEASE** leave the room.
- In opening statement, it is not necessary to include Club specific comments, e.g. from the RVQ or the Club website. Facilitators should offer only positive comments about a Club, not an evaluation of the Club. Best practices should include some club specific info.
- Ask club members to briefly introduce themselves (name, position(s) in club, years in Rotary). Consider asking them to indicate their Rotary passion.

POWER POINT PRESENTATION

- The presenter should practice several times beforehand, and have talking points. Do not read the slides.
- PowerPoint presentation should move quickly and not take more than about ten minutes.
- If PowerPoint will not be used again, take down and remove the equipment.

INTRODUCING THE WRITING EXERCISE:

- Emphasize the concept of creating a vision from the start—where the club wants to be in five years—and guide the group to envision themselves as actually being in the year 201_ (five years from now).
- Carefully read the letter from RI President at the start of the writing exercise.

FILLING OUT THE VISION EXERCISE

- Ask participants to write the year five years out on the top of the writing exercise to help them focus on it.
- Display a flip chart that says “It is now 201_”.
- Clarify the fund raising category (Item C-6) before they begin writing—the dollars recorded need to be the total for the five years.

EXTRACTING FROM THE WRITING EXERCISE TO FLIP CHARTS

- Encourage participants to share their writing exercise ideas by starting with a present tense action verb, “We *have* a teen center in the middle of town.” (It has occurred.) or past tense, “We sent a team to Burundi to ...”
- Help participants to reduce their ideas to succinct statements or restate so that the scribes can record.
- Redirect off-topic comments to the correct wall chart or ask contributor to hold the thought till that category comes up,
- Direct extraneous ideas to the *parking lot* wall sheet. Value all ideas.

EXTRACTING CONTINUED

- Read the description for each category, prior to asking for ideas from participants.
- Communicate with scribes and set a pace that enables scribes to have time to think and create legible and orderly charts.
- Work to ensure that participant ideas are accurately captured. Encourage scribes to ask for clarification if they are not sure.
- Encourage participants to list an *accomplishment* during the extraction exercise—not just a great idea. Remind them when necessary: “It is 20xx. What has your club accomplished?”
- Use body language to discourage side conversations or other distractions.
- Manage the time effectively. Encourage ideas from everyone who wants to contribute but don’t persist if people are not offering an idea in a category. The intent is to capture most of the ideas before the participants start tiring.

POSTED WALL CHARTS

- Leave a gap between categories when hanging the wall charts so dot voting is done in categories. Use blue painter’s tape to separate categories. This reduces congestion and will speed up the voting process.
- Runner should remove chairs from in front of wall charts for easier access.

ROUND 1, BLUE DOTS – 34 (11 categories x 3 dots + 1 for Membership category)

- Facilitators write, “1 dot only” on the chart for Membership.
- Carefully explain dot exercise. Participants are often confused as to what to do—especially with the 3 dots vs. 1 dot issue and with using no more than 3 dots in any category (not using multiple dots on a high priority category.)
- Instruct the participants to start dot voting in different areas. Organize the traffic flow to reduce bunching, wait time, and side conversations.
- Don’t start crossing out ideas until everyone has voted. Encourage them to keep moving,
- Assign one facilitator—probably runner—to decide how many dots for an item to be crossed off before the red dot vote, and then tell the rest of team to do it.
- Facilitators use black markers to cross out unpopular ideas on flip charts- those with few votes after first round.

ROUND 2, RED DOTS – 33 (11 categories x dots) (none for membership)

- Instruct participants to not vote the second time on one category: Membership.
- For large groups, consider designating a separate space on the wall charts to place the red dots to avoid obliterating the blue dots, e.g. the right hand side of the sheet.
- After all voting, count number of blue / red dots for each idea. Write this number in a circle on flip chart.
- Use black markers to cross out unpopular ideas (those with fewer than three votes) on flip charts.

SYNTHESIZING KEY OBSERVATIONS ABOUT THE CLUB

- The Synthesizer should review the wall charts as the second dot voting round is finishing. Underline key words or phrases with a red marker to highlight important concepts. Briefly report these to the club to help them start to see the vision they have created.
- **Keep the charts on the wall until the event has ended in case clarification is required.**

CLUB ACTION PLAN AND ASSIGNMENTS

- Using the wall chart template as a guide, give clear, concise definitions for Club Vision Champion & President's Development Team so the club can decide who should volunteer. (Consult with the Club President prior to vision event about the types of people for these positions, so this will not come as a surprise.) The Rotary Club determines the Action Plan responsibilities; the facilitator(s) should not suggest candidates.
- Get specific dates for accomplishing each item of the Club Action Plan, if possible. Refer to a calendar so an actual date can be recorded.
- Explain to the club that their challenge is to communicate the results of this event to the non-participants. They need to involve non-participants in planning how to achieve their vision.
- As a last resort if no one volunteers or if there seems to be resistance, explain that the President's Development Team could be chosen by the Club President or Board and the Club Vision Champion could be chosen by the President's Development Team and the Club President at a later time.

CLOSE WITH SUMMARY

- Thank club participants for their hard work.
- Provide a closing summary with questions to group: "What are your concerns?" and "What energizes/excites you about the process?"
- Explain that the District has a tool kit to assist the club in moving forward.
- Distribute feedback form and ask participants to fill in before they leave.
- Respond to questions on available help for next steps.

AFTER THE EVENT

Lead Facilitator

- Send copy of the Club Action Plan with names & dates to District Vision Facilitation Coordinator.
- Ask facilitation team members for their comments on the event pro and con.
- Prepare an email observation report and send to the District Vision Facilitation Coordinator.
- Check periodically with Club Vision Champion to ensure that they are off to a good start. Offer support and resources including vision to plan documents.