

## **After the Club Visioning Event**

Your club has just participated in a visioning event and the enthusiasm level is probably high. Many ideas have been generated that will help your club move towards achieving your vision for what you want to be—if you take the next steps to move from vision to plan to action. This document will define terms and provide some guidelines and suggestions to help in the process.

**Rotary Visioning Questionnaire**—the online survey your club members were asked to complete prior to your visioning event. A copy of the results was given to your club's president at the visioning session. This information will provide you with an important snapshot of what you are as a club today and will be useful in assessing opportunities and challenges for future planning.

**The Club Vision Champion**—a club member to serve in this role, selected by the participants or the club president, will ensure that the vision created at your session remains in the forefront as the club leadership discusses annual goals and projects that the club expects the vision to cover (three to five years). This person supports the efforts of the team that the club selects to develop strategic plans and tactics.

The Club Vision Champion should have a passion for seeing the club realize its vision and will serve as the primary contact with the District Vision Facilitation Team—most likely the Lead Facilitator—for communications after the visioning event. This person will serve as the chief advocate to ensure that progress is tracked and documented, and that the plans are being implemented. Some clubs make this a multi-year board position to ensure continuity.

**The Club Action Plan** – This was the last assignment at your visioning event during which different members of your club were identified to fill key roles to move your club forward. There were four tasks identified:

1. Compile and summarize the wall charts from the visioning event.
2. Create a Statement of Purpose for your club.
3. Schedule a club assembly to share what has happened.
4. Assemble a President's Development Team.

The following information, based on the experiences of other clubs in the District, is provided to assist your club members who have agreed to fill these roles. The initial work on these tasks should begin immediately after the visioning event and continue through the following months.

**Chapter One**                      **Compile wall charts into an Excel spreadsheet.**

*Guidelines for the person who volunteered for this task*

The compilation of the many ideas posted on the wall charts during the vision session should be done immediately after the event. The lead facilitator from your session will e-mail an easy-to use Excel template to the volunteer for this task.

1. A facilitator will give all of the wall charts to the person who agreed to compile the summary spreadsheet. The wall charts should be numbered consecutively with the category label at the top. (Facilitators should have done this during the visioning event.)
2. Go to the first Excel workbook tab “All” and enter each line of the wall charts. An example is available from the lead facilitator if needed.
3. Count the number of blue dots and enter this information for each line of the wall charts. (The Vision Facilitation Team may have written the number on each line item.)
4. Repeat for the number of red dots.
5. Copy the highest scoring red dot items (maximum of four) from each category on the first tab, “All”, to the second tab labeled "Information to Share."
6. Enter the name of each person responsible for a specific activity on the Club Action Plan at the bottom of the page along with the date due.
7. Save and check with “print preview” to ensure that the summary page labeled "Information to Share" will print on one page. If not, adjust the print area so that it does print on one page. Instructions at the top of the page can then be deleted.
8. Send a PDF copy of the "Information to Share" to the Club President and club members as appropriate. Please also send a copy to the Lead Facilitator (who will continue to be a resource to your club on visioning) and to the District Visioning Coordinator, Tony Wagner at [tony.bellner@gmail.com](mailto:tony.bellner@gmail.com).

The goal is to produce a one-page summary of the information that others can read.

## **Chapter Two      Draft a Statement of Purpose.**

A Statement of Purpose, similar to a mission statement, explains why the club is in existence today and what the club stands for in its community. It can also reflect the club's characteristics and personality. Some clubs create a vision statement (what the club wants to become) as well as a mission statement. See samples below.

### *Statements of Purpose With Examples from Rotary Clubs*

**You might write a mission statement, which explains who you are and what you do. It should incorporate your core values.**

"The Rotary Club of Exeter, NH is a community leader in service and charitable giving. The members are dedicated professionals who are proud of their community's history and are committed to the continued well-being of others. Exeter Rotarians are part of a global Rotary family of trustworthy, like-minded individuals who promote and advance local and worldwide peace, goodwill and friendship through their actions and words."

"The Rotary Club of Breakwater Daybreak, South Portland – Cape Elizabeth, Maine is a diverse group of business and civic leaders who follow our international motto "Service Above Self." We work together and with other service organizations in our community and abroad to create opportunities for leadership training, public speaking, literacy, mentoring, vocational training, and scholarships."

"Kennebunk Portside Rotary is a service club that serves the Kennebunks, Arundel, and surrounding communities. The basis for all of the club's activities is the Rotary motto of "Service Above Self". Members embrace Rotary's Four Way Test of high ethical standards and live by its principles in their personal and professional lives. Through fund raising and fellowship, the club provides hands on and financial support to local, regional and international humanitarian projects.

**You might write a vision statement indicating what you as a club want to become.**

XYZ Rotary will be a well respected, visible service organization in our community and will be recognized as effective in making a difference in the lives of people locally, regionally and internationally.

**You might also come up with a motto or slogan that presents your message in just a few words.**

"To promote friendship, good will and good works" Lake Forest/Lake Bluff, IL

"Volunteering to improve lives locally and globally" North St. Paul, MN area

“We’re loud, we’re proud, we’re fun in a crowd.” Edmonton South, Alberta

### **Chapter Three                      Schedule a club assembly to share what happened at your visioning session.**

Your visioning session generated excitement and a vision for making your club even better in five years. However, not all your club members shared this experience. Before you can begin to turn your vision into a plan for moving forward, you need to get buy in and commitment for the vision from all your members. Clubs have found it useful to hold a club assembly for this purpose within one month after the visioning event.

#### **There are four goals for this important meeting:**

1. Make sure that the whole club understands what was decided and how it was done through a consensus process. Provide readable copies of the Excel spreadsheet or present a PowerPoint presentation that clearly reviews that information.
2. Explain how many attended the visioning event and ask several participants to speak about the experience. (One club made sure that new members or usually quiet members were among those who spoke.)
3. Introduce the Club Vision Champion and the President’s Development Team (see Chapter Four), thanking them for their involvement and letting the club know they have made a commitment for several years. This is a good time for the team to ask if any club members need clarification about possible confusing items from the spreadsheet.
4. Introduce those who have crafted the Statement of Purpose. They should read it, explain their process for creating it, ask for buy in and explain where it can be found in the future i.e. website, weekly newsletter.

### **Chapter Four                      Assemble a President’s Development Team.**

Because the club’s Board of Directors is focused on the day-to-day tasks of running the club, it typically may not have time to champion future vision ideas and develop strategic initiatives. Many clubs form a separate committee, called the President’s Development Team, to oversee the long range planning process.

The Presidents’ Development Team consists of four or five club leaders—past, present and future. The team might include one or more past presidents, the current president, and the two future presidents—president-elect and vice president. Others who might be included are the Club Vision Champion or a current board member who has demonstrated leadership ability. The team is responsible for developing a multi-year

District 7780  
Club Visioning Tool Kit

strategic plan (three to five years is suggested with opportunities for evaluating and revising as needed) to accomplish the vision.

The team is supported and encouraged by the Club Vision Champion and the District resources available to that person and the club.

**While it is not an exact science as to how this team should operate, here are some procedural ideas that other clubs have used:**

The President's Development team should meet regularly (monthly or as necessary during the first year) and report regularly to the club's board of directors.

### **Getting Started**

1. Categorize the visioning ideas. Begin by reviewing the Excel spreadsheet mentioned in Chapter One. You will likely find that the items fall into the following categories:
  - a. Tracking items – These items are already accomplished or assumed. For example, you already have a major fundraiser and it is doing well every year. The Excel spreadsheet says, “Grow our major fundraiser by 10% every year”. This is an item the team needs to keep in mind but no immediate action is required assuming that a chair for the event is chosen in time and all other activities are managed. As the event gets closer to taking place you will want to remind those in charge of the 10% goal that the club has set.
  - b. Confusing Items – If there is an item on the list that the team does not understand then they need to take that item back to the club for clarification at a club assembly.
  - c. Bigger than Life Items – There may be items that are very large such as “Become a focus of all town activities”. This may be an item to leave until the more easily achievable goals are underway.
2. Bundle and prioritize – Once the items above have been identified, planning can begin on the remaining items as soon as possible. If you see that there are many programs in the list that relate to international efforts or youth you might want to bundle them together and focus the team on the broad category of club youth programs or club international efforts.
3. Noodle – It is now time to begin to discuss the highest priority items in detail. The goal is to assist the club in developing a strategy for accomplishing those items.

## **Chapter Five      Developing a Strategic or Long Range Plan**

Several District 7780 clubs that have participated in visioning events have begun the process of developing strategic plans and establishing measurable goals to help them achieve their visions. District 7780 has some tools that can assist in this process including wall chart diagrams that illustrate:

1. The Club Vision to Plan Process
2. Who leads each step in the Vision to Plan Process
3. What is the timeline for each step in the Vision to Plan Process
4. What are the outcomes for each step in the Vision to Plan Process

Please contact District Vision Facilitation Chair, Jim Price, if you would like these tools. Rotary International also provides resources to help clubs understand the strategic planning process and its importance to both RI and individual clubs.

### **Rotary Club Strategic Planning Resources**

#### **Rotary International Web Resources found at:**

<http://www.rotary.org/en/AboutUs/RotaryInternational/StrategicPlanning/Pages/ridefault.aspx>

#### ***The newest (2010) RI Strategic Plan***

RI revised its strategic plan in July 2010. It has unified its strategic direction defined by its Core Essence and Mission:

#### **Core Essence**

A worldwide network of inspired individuals who translate their passions into relevant social causes to change lives in communities.

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#### **Mission**

We provide service to others, promote integrity, and advance world understanding, goodwill, and peace through our fellowship of business, professional, and community leaders.

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#### **Strategic Priorities**

Strengthen and support clubs; Focus and increase humanitarian service; Enhance public image and awareness.

#### ***Strategic Planning Guide***

District 7780  
Club Visioning Tool Kit

Provides worksheets and information to help clubs set goals and develop a plan to implement them. The process of creating a strategic plan should be undertaken by a group of club leaders and should involve all members. The guide helps clubs create a vision of where they would like to be in three years and develop long-range and annual goals that support that vision. A copy of the guide follows.

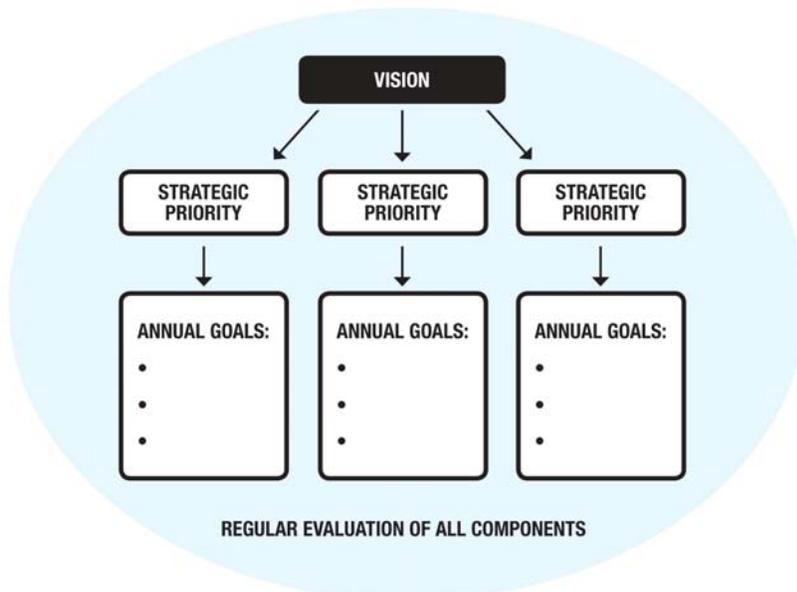
Appendix

## Rotary International Strategic Planning Guide

Strategic planning involves creating a vision, with supporting goals that can be regularly measured and adjusted as needed. Use this guide and the accompanying worksheet as a starting point for developing your strategic plan, and customize these resources to meet your club's needs. The guide is designed for Rotary clubs but can be adapted for districts. The worksheet can be completed independently or as a group. Facilitators should become familiar with these resources and prepare an agenda before conducting a strategic planning meeting. The agenda should allot the majority of time to the second and third steps of the process, which focus on the future, and less time to the current state of the club.

During the strategic planning process, keep the following tips in mind:

- Involve past, current, and incoming club leaders.
- Include a wide variety of perspectives by involving the full club or a diverse representation of your club's membership.
- Consider all ideas.
- Ask an unbiased facilitator or a small group of facilitators to run strategic planning meetings.



- Reflect on how your club's goals align with those of your district and the priorities and goals of the RI Strategic Plan.

- Be prepared to revisit your plan each year and adjust your strategic priorities and annual goals as needed.

### The Strategic Planning Model

Create a vision for your club, with strategic priorities that will help you achieve it. Then develop annual goals that

District 7780  
Club Visioning Tool Kit

## Process

Develop a strategic plan by engaging members in the process below. Use the accompanying worksheet to record your ideas.

### 1. Where are we now?

- Create a list of your club's strengths and weaknesses as of today.
- Create a list of opportunities and challenges facing your community.

When assessing your club's current state, consult [Be a Vibrant Club: Your Club Leadership Plan](#) to determine what your club is already doing well and what you could do to rejuvenate it.

### 2. Where do we want to be?

- Create a list of 5 to 10 characteristics that you would like to see in your club three to five years from now.
- Draft a one-sentence vision statement describing your club and what you want it to be in three to five years. Allow for both individual and group work on this step.
- Finalize the vision statement with the full group, and make sure that all club members support it.

### 3. How do we get there?

- Develop strategic priorities that will help your club achieve the vision, considering:
  - Strengths and weaknesses of the club
  - Programs and missions of Rotary International and The Rotary Foundation
  - External environment
  - Involvement of all members

- Achievability in three to five years

- As a group, decide on the most important strategic priorities — those that will have the greatest impact as your club works toward the vision.
- Identify annual goals that support each of the top strategic priorities.
- Determine the timeline, resources, and people necessary to meet the annual goals under each of the strategic priorities.

Use the [Planning Guide for Effective Rotary Clubs](#) while identifying your annual goals for ideas and strategies to achieve them.

### 4. How are we doing?

- Create a strategic planning team to regularly monitor progress and recommend revisions to the plan, if needed.
- Allocate sufficient resources for the plan's implementation.
- Continually evaluate all decisions to make sure they support the plan, providing feedback to the strategic planning team on their implementation.
- Review your strategic plan annually with all club members, including the vision statement, strategic priorities, and annual goals, and revise it as needed.
- Repeat the full strategic planning process every three to five years to create a new plan or uphold the current one.

# Strategic Planning Worksheet

Complete this worksheet to create your strategic plan.

**1. Where are we now?**

**Today's date:** \_\_\_\_\_

Club strengths

Club weaknesses

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Opportunities for the community (e.g., new businesses, growing population)

Challenges facing the community (e.g., economic decline, competing services)

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Club strengths

Club weaknesses

**2. Where do we want to be?**

**Target date:** \_\_\_\_\_

Key characteristics of future state (e.g., number of members, retention percentage, balance between local and international projects, support of The Rotary Foundation)

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Vision statement (Include something that will make your club stand out from other service clubs in your community — e.g., *Our vision is to be the most internationally diverse service club in our community, Our vision is to be the service club most supportive of youth in our community.*)

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District 7780  
Club Visioning Tool Kit

**3. How do we get there?**

To reach our vision, we must achieve the following goals. (On the lines below, write out each of your strategic priorities. Then, in the chart beneath each one, list annual goals that will help you achieve each of them. Though there is no limit to the number of strategic priorities or annual goals in your strategic plan, consider the resources available to you, and focus on goals that you can accomplish.)

**Strategic priority 1:** \_\_\_\_\_

Annual goals	Timeline	Resources needed	Member assigned

**Strategic priority 2:** \_\_\_\_\_

Annual goals	Timeline	Resources needed	Member assigned

**Strategic priority 3:** \_\_\_\_\_

Annual goals	Timeline	Resources needed	Member assigned

**4. How are we doing?**

To monitor our progress, we will take these steps. (List the actions the club will take to follow up on the plan’s implementation, including a timeline for checking in and evaluating your progress — e.g., reports at board meetings each month, strategic plan reviews at club assemblies, annual reviews.)