



Vision Facilitation

Club Vision Event Coordinator

Timeline Guide

Welcome to the Club Vision Event Coordinator Role

Thank you for offering to be your Club Vision Event Coordinator. Your role is critical to the success of this event as you are the one leading the charge to prepare for your club's event.

Your point of contact at the district level is the District Vision Coordinator. All questions, updates, and preparation steps should be communicated through this liaison.

Your District Vision Coordinator is: _____

Email _____

Phone _____

Fax _____

Best time of the day to reach _____

As Club Vision Event Coordinator, your role is to make sure the communication and needs for this event are taken care of at the club level (with direction from the District Vision Coordinator). This means that you will be performing pre-event duties such as communicating with the District Vision Coordinator, inviting your club leaders (along with other club members), setting up the venue (times, facilities, meals, and supplies), and distributing important documents between your club members and the District Vision Coordinator.

You also become the liaison between the District Vision Coordinator and your club when dealing with questions and timeline expectations. Your proactive planning of this event can make or break the visioning process. Another important aspect is to help your club to understand how this process works to compliment and support the RI Club Leadership Plan (CLP). If your club already has this in place, then you are knowledgeable already. If your club does not have this in place, there is some information provided on the next page that may help you. You can also find information on the Rotary International Website at <http://www.rotary.org/en/Members/RunningAClub/ClubLeaders/Pages/ridefault.aspx>

You may share any of these pages with your club leadership. The more they understand the vision process and the Club Leadership Plan, the better decisions they can make on your club's behalf.

Again, thank you for volunteering for such an important role. And if you have any questions, please do not hesitate to call.

Understanding the Club Leadership Plan

The Club Leadership Plan is the recommended administrative structure for Rotary clubs. It is based on the experiences and best practices of many effective clubs. Although it is not mandatory for any club to adopt the Club Leadership Plan, every Rotary club, new and old, can benefit from standardizing its administrative procedures based on these best practices.

Benefits of the Club Leadership Plan

By providing an opportunity to reassess current operations, the Club Leadership Plan can help clubs realize many benefits:

1. All members have a chance to voice their opinions on the future of their club.
2. Simplified club operations give members more time to focus on service and fellowship.
3. Greater involvement of club members develops future club and district leaders.
4. Membership retention rates increase as members have greater participation in the club's activities.
5. Club leaders have a larger group of members working to achieve the club's goals.
6. Continuity between appointments and the club's goals eases the leadership transition from one Rotary year to the next.
7. Renewed enthusiasm for Rotary comes from taking a fresh look at the practices of the club.

Implementing the Plan

Past, current, and incoming club officers work together to customize a leadership plan for their club based on the practices below:

1. Develop long-range goals that address the elements of an effective club.
2. Set annual goals that support long-range goals.
3. Make sure that all club members feel involved and informed.
4. Keep the lines of communication open, both in the club and with the district.
5. Ensure continuity in leadership from year to year.
6. Customize the bylaws to reflect club operations.
7. Provide regular fellowship opportunities.
8. Actively involve all club members.
9. Offer regular, consistent training.

Vision Facilitation and the CLP

The first step in implementing the CLP is to develop long-range goals that address the elements of an effective club. Your long-range goals should cover the next three to five Rotary years and address the elements of an effective club: membership, service projects, The Rotary Foundation, and leadership development. They should also include strategies for promoting your club's successes in each element. As your club's leadership plan evolves, these goals should be updated.

The District has created a team of facilitators who can assist your Rotary Club in developing that vision that is the foundation of a long-range plan. The volunteer facilitators are experienced Rotarians who are Past District Governors, Executive Assistant Governors and Assistant Governors. Several members of the Vision Team have been in Rotary over 25 years. They are experienced facilitators and knowledgeable about Rotary at local, district, and international levels.

The session is intended for all interested Rotarians in your club—from your newest members to your most tenured. The breadth and depth of the facilitation exercise is ensured when club leaders and its opinion-makers participate. Moreover, attendance is expected among present board members, the current president, president-elect, president-elect nominee, immediate past-president, and two other past-presidents. Their collective involvement is essential. The facilitation team anticipates all participants will come with an open mind, stay the entire session and be fully engaged in a productive, creative session to define the future of your club.

The success of the facilitation can be measured by at least three measures:

1. An immediate measure of progress will be the members' pledge and willingness to move the planning processes from a nice-to-do concept to meaningful growth programs for the club, its members, and its community.
2. The second is that the output from this 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. Finally, 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.

Rotary Club Requirements

As the Club Vision Event Coordinator for the vision session facilitated by trained District Rotarians, your Rotary Club is expected to provide the following:

1. A suitable meeting room: With a U-shaped set-up of tables and chairs facing a screen and an easel on either side. Water and glasses on the tables as well. Please allow enough room along the wall of one of the rows of chairs to allow for 20-30 sheets of easel paper (wall charts) to be hung on the wall for the exercises.
2. Participation of 15 – 20 (is the ideal, with 30 maximum) club members including past and future Presidents, board members and a representation of the club membership from the newest to the most tenured. Please ask your members to be on time and plan to stay thorough the entire process as it is sequential...thank you. We recommend that alcohol not be served until conclusion.
3. Food buffet/box supper for all attendees and facilitators...we suggest a box supper or a light buffet sandwich line to expedite food service and minimize clean-up. Please note that while members are eating, the facilitators are presenting. That means the meal must be quick and easy to serve and tidy up.
4. Additional items:
 - a. 20-25 table name cards with attendees names printed large on the cards
 - b. 2 easels with full sized Post-It easel pads (wall charts)

The best wall chart-post-its are 3M brand because they stick to any surface and hold. Look for: 3M post-its 559 plain or 560 w/faint blue lines – full size = 2.5 ft X 2.08 ft (Not the table top smaller size)
 - c. Projection screen
 - d. Extension cord w/ multiple plug ins (This is a very important back up piece of equipment)
 - e. Minimum 800: Color coded label dots (3/4" in diameter sized)–dark blue or green
 - f. Minimum 800: Color coded label dots (3/4" in diameter sized)–red or orange

Please note: this size is very important. Dots that are smaller than this will not work. The best product is: Avery 05466 (T5466) Color Coding Labels – 3/4" round dots in red and blue (1 package each of 1,008)
or Office Depot 3/4" Color Coding Labels-Round dots in red and dark blue (1 package each of 1,008)
 - g. Variety of blunt "permanent" colored markers
 - h. Scissors (Needed to cut the dots)
 - i. Pens for filling in the exercise, one for each participant
 - j. Note paper for each participant
 - k. Roll of masking tape

Timeline & the Event Coordinator Role

Leading Your Club in Planning this Event:

The Rotary Club requesting a vision facilitation event will identify a “Club Vision Event Coordinator” before any event planning activities begin. This person will coordinate the entire event and provide requested visioning outcomes back to the District Vision Coordinator and Facilitation Team after the event.

The District Vision Coordinator will establish contact with the Club Vision Event Coordinator to set the date for the facilitation event, give out information about club expectations, and coordinate pre-event documents needed to be filled out by the club. The Club Vision Event Coordinator Guide (this document for event organization) is the first important document needed and should be read months prior to the event at the time you, as the Club Vision Event Coordinator, work with the District Vision Coordinator to schedule dates. This guide, along with other forms, will help you understand the process and timing of such an event.

The District Vision Coordinator will also be directing you to the District website to become familiar with the following documents:

“Frequently Asked Questions by Clubs”: This will be helpful to you and your club’s leadership in determining the importance of such an event.

“Pre-Vision Session Club Profile”: This is an online form for you to fill out and submit to the District Vision Coordinator.

The “What is a Rotary Vision Questionnaire?” (RVQ) form: This will help you understand this type of club survey.

A Rotary Vision Questionnaire (RVQ) is sent to all vision session attendees 4-6 weeks preceding facilitation with the expectation that results are sent to the facilitation team two weeks before the scheduled facilitated event. You will need to gather email addresses of all vision attendees to ensure this survey is completed prior to the event. Once the RVQ is completed, information is compiled into a summary of results by the District Vision Coordinator for use by the Vision Team.

The Club Vision Event Coordinator will manage the venue (room), lay out of the tables as requested in this guide, prepare all logistics of the meal, gather all the supplies as requested in this guide, and continue to communicate with the District Vision Coordinator. The Club Vision Event Coordinator will supply the District Vision Coordinator with details (# of participants) and directions to the site of the facilitation a minimum of 1 - 2 weeks prior to the vision event to distribute to facilitators.

Basic Vision Facilitation Event Timeline (See Checklist for details)

4:30 – 5:00 Arrival of facilitation team and set-up (As the Club Vision Event Coordinator, you should arrive a little before 4:30 to ensure tables are laid out properly and greet the facilitation team)

5:00 – 5:15 Start Buffet line for meal or box supper and be seated for meal (the meal occurs while the facilitation team is presenting a PowerPoint – this is a working supper)

9:00 Conclusion (Help to wrap up the session as directed by the facilitation team lead, clean up room, understand if you have been asked to take on any other “next step” actions on behalf of your club)



VISION

Club Vision Event Coordinator Checklist

The Club Vision Event Coordinator is the communication person back to the District Vision Coordinator who schedules and prepares for club visioning sessions. As your local club's coordinator, it is your task to take care of things on the home front, preparing and setting up the local event.

When a Rotary club expresses interest in having a visioning session facilitated by the District Facilitation Team, the first contact is the District Vision Coordinator. Any requests for scheduling should be sent to this point person. The District Vision Coordinator then explains to a designated Club Vision Event Coordinator, the tasks that are needed to prepare for the event. This checklist should help you to follow through on these assignments:

Club Vision Event Coordinator Duties and Responsibilities

Event Timeline (a guide)

Date Completed

6 - 3 Months Prior to the Event	
Initial contact of interest is made with the District Vision Coordinator	
An individual from the club is identified as its Club Vision Event Coordinator	
Options for event date and time are discussed with the District Vision Coordinator	
Receive information or advice from the District Vision Coordinator as to what types of club members and how many to invite to the event	
Download and read the Club Vision Event Coordinator Guide from the District Website	
View the Frequently Asked Questions page and Vision	

Session Overview page from District website (can be distributed to club leaders)	
Access the Pre-session Club Profile online, fill it out, <u>and submit it to the District Vision Coordinator</u>	
The District Vision Coordinator will offer up date options that the facilitation team is available and sends these to the Club Vision Event Coordinator via email	
The Club Vision Event Coordinator will work with club leaders to determine the final choice for the event date	
The Club Vision Event Coordinator will email or call the District Vision Coordinator with the date choice	
3 - 2 Months Prior to the Event	
The Club Vision Event Coordinator, with the help of club leaders, determine who to invite	
The Club Vision Event Coordinator will email the District Vision Coordinator with the list of invitees and their email addresses (used for the RVQ survey tool)	
The Club Vision Event Coordinator will formally invite all designated members to the event	
Nail down a venue (room) and reserve it for club's vision event	
6 - 4 Weeks Prior to the Event	
The RVQ survey link via email is sent by the District Vision Coordinator. Deadline for returning this to the District Vision Coordinator is at least two weeks prior to the	

session...communicate with the District Vision Coordinator for a defined date	
Plan and order the meal	
1-2 Weeks Prior to the Event	
Gather all the requested supplies	
Send final number of participants, directions to the event, and other details to District Vision Coordinator ideally 2 weeks prior to the event (this may mean calling some members to make sure they will be attending)	
The Week of the Event and At the Event	
Contact the District Vision Coordinator to confirm that all is ready and everything is covered.	
Come 15 minutes prior to the District Facilitation Team's arrival to make sure tables are arranged properly, make sure temperature of the room is comfortable, and have the supplies ready to go. Make sure meal will be there on time	
Monitor the meal and clean up	
Make sure wall charts are taken down and given to the designated action plan individual	
Clean up room as people leave	