



Rotary D-5340 Visioning Team Club Facilitation Overview – Leader Guide

- 1. Desired Number of Participants:** 15 – 25 club members including past and future Presidents and board members. **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.
- 2. Typical Facilitation Time-line: 4:30 (set-up) to 9:00 (conclusion)**
Participant club members arrive at 4:45 and can expect to conclude around 9:00
- 3. Room Set-up:**
U – Shaped set-up of tables and chairs facing a screen and white board if possible with an easel on either side of the white board. 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 to be hung on the wall for the exercises. A couple of sheets attached to the white board as “Parking Lot” of ideas.
- 4. Food Buffet/Box Supper:** Starts at 5:00 with all participants seated and eating by 5:15.
- 5. Needs List:**

Provided by Participating Club -

- Meals for all attendees and facilitators...we suggest a box supper or a light buffet sandwich line to expedite food service and minimize clean-up.
NOTE: We recommend that alcoholic beverages not be served.
- 20-25 tent cards with attendees names printed LARGE on the cards
- 2 Easels with full sized Post-It Easel Pads
- Projection Screen
- Projector
- Ext. Cord w/ multiple plug in
- Minimum 800 – Color Code Label Dots (3/4” in diameter sized) – Dark Blue or Green
- Minimum 800 – Color Code Label Dots (3/4” in diameter sized) – Red or orange
- Variety of blunt “permanent” Colored Markers
- Scissors
- Pens for filling in Exercise for each participant
- Roll of Masking Tape

6. Provided by Facilitators -

- Rotary Vision Questionnaire (RVQ) provided to club prior to facilitation
- 20 - 25 Facilitation Exercises
- Lap-top with PowerPoint Presentation on it

7. Cost to the Participating Club:

Our Team of Rotarian facilitators provides this service to our District clubs at no cost

8. General Recommendations:

We recommend that the facilitation team have an extra set of the following materials:

Blue and red dots

Scissors, tape, markers, card stock (for participant names)

Two flipcharts (3M Post-it style)

If available – sturdy easels

Camera

Print the cheat sheet (Addendum 1) and put in plastic sleeves to have information at fingertips during facilitation event.

Arrive early – you may need to do some work on room set-up (rearrange chairs, work on available wall space, figure out Technology set-up, etc.)

Time Line for Event:

1. The Rotary Club requesting a Vision Facilitation Event will identify a “**Club Coordinator**” that will coordinate the entire event **before** any event planning activities begin and provide requested visioning outcomes back to the District Vision Team.
2. The District Vision Facilitation Team Coordinator will establish contact with the Club Coordinator to **set the date for the facilitation event and outline club expectations.**
3. Rotary Club Facilitation Overview (*this document for event organization, emailed 30+ days prior to the event. to the club lead to understand the process and determine the timing of the event*)
4. Rotary Vision Questionnaire (RVQ) (*Link to survey sent to facilitated club coordinator 30+ days preceding facilitation with the expectation that they will be complete 2 days before the event*)
5. Rotary Vision Questionnaire (RVQ) information is summarized by the Vision Team Coordinator for use by the Vision Team facilitation.
6. The Club Coordinator will supply Vision Team Coordinator with details (# of participants) and directions to the site of the facilitation **1 week** prior to the Vision event to distribute to facilitators.
7. **The Event – Evening Preparation:** The Club Coordinator will have the room set up, food procured and the list of facilitation “tools” ready for the facilitation team’s arrival.

8. **The Event - Timeline**

4:30 – 5:00	Arrival of facilitation team and set-up																																							
5:00 – 5:15	Start Buffet line for meal or box supper and be seated for meal																																							
5:15 – 5:20	Introduction of Facilitation Team (<i>Name, Club, Rotary experience</i>) Rotary Facilitator Outline (<i>Rules of the Facilitation</i>)																																							
5:20 – 5:40	Present the PowerPoint Presentation (<i>while everyone is eating</i>)																																							
5:40 – 5:50	Introduction of Rotary club members (<i>Name, Classification, # years in Rotary (in this club or others), and club leadership role</i>)																																							
5:50 – 6:00	Clean-up meal mess/bathroom																																							
6:00 – 6:10	Introduce Vision Exercise																																							
6:10 – 6:40	Rotarians fill out the Vision Exercise																																							
6:40 – 8:00	Extraction of “22+ Sheets”																																							
8:00 – 8:05	Break - (<i>cross out redundant statements, MOVE elements that are in the “wrong” category i.e.: STRIVE under Community Service to Vocational Svc, mark charts for # dot voting, rearrange charts if needed</i>)																																							
8:05 – 8:30	Round 1 - Blue Dot prioritization on each of the 10 Categories of: <table border="0" style="margin-left: 20px;"> <tr> <td style="vertical-align: top;">1.</td> <td><i>What does club stand for?</i></td> <td style="text-align: right;"><i>(3 Dots)</i></td> </tr> <tr> <td style="vertical-align: top;">6:29</td> <td>2A. <i>Membership number</i></td> <td style="text-align: right;"><i>(1 Dot)</i></td> </tr> <tr> <td style="vertical-align: top;">6:31</td> <td>2. <i>Membership because</i></td> <td style="text-align: right;"><i>(3 Dots)</i></td> </tr> <tr> <td style="vertical-align: top;">6:40</td> <td>3. <i>Club Service</i></td> <td style="text-align: right;"><i>(3 Dots)</i></td> </tr> <tr> <td style="vertical-align: top;">6:49</td> <td>4. <i>Vocational Service</i></td> <td style="text-align: right;"><i>(3 Dots)</i></td> </tr> <tr> <td style="vertical-align: top;">6:58</td> <td>5. <i>Community Service</i></td> <td style="text-align: right;"><i>(3 Dots)</i></td> </tr> <tr> <td style="vertical-align: top;">7:12</td> <td>6. <i>International Service</i></td> <td style="text-align: right;"><i>(3 Dots)</i></td> </tr> <tr> <td style="vertical-align: top;">7:21</td> <td>7A. <i>Fundraising amount</i></td> <td style="text-align: right;"><i>(1 Dot)</i></td> </tr> <tr> <td style="vertical-align: top;">7:23</td> <td>7. <i>Fundraising events, methods</i></td> <td style="text-align: right;"><i>(3 Dots)</i></td> </tr> <tr> <td style="vertical-align: top;">7:32</td> <td>8. <i>Public Relations</i></td> <td style="text-align: right;"><i>(3 Dots)</i></td> </tr> <tr> <td style="vertical-align: top;">7:41</td> <td>9. <i>The Rotary Foundation</i></td> <td style="text-align: right;"><i>(3 Dots)</i></td> </tr> <tr> <td style="vertical-align: top;">7:50</td> <td>10. <i>Leadership Development</i></td> <td></td> </tr> <tr> <td></td> <td><i>Total dots to hand out to participant</i></td> <td style="text-align: right;"><i>32 Dots</i></td> </tr> </table>	1.	<i>What does club stand for?</i>	<i>(3 Dots)</i>	6:29	2A. <i>Membership number</i>	<i>(1 Dot)</i>	6:31	2. <i>Membership because</i>	<i>(3 Dots)</i>	6:40	3. <i>Club Service</i>	<i>(3 Dots)</i>	6:49	4. <i>Vocational Service</i>	<i>(3 Dots)</i>	6:58	5. <i>Community Service</i>	<i>(3 Dots)</i>	7:12	6. <i>International Service</i>	<i>(3 Dots)</i>	7:21	7A. <i>Fundraising amount</i>	<i>(1 Dot)</i>	7:23	7. <i>Fundraising events, methods</i>	<i>(3 Dots)</i>	7:32	8. <i>Public Relations</i>	<i>(3 Dots)</i>	7:41	9. <i>The Rotary Foundation</i>	<i>(3 Dots)</i>	7:50	10. <i>Leadership Development</i>			<i>Total dots to hand out to participant</i>	<i>32 Dots</i>
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8:30 – 9:00 Round 2 - Red Dot prioritization on each of the 10 Categories (*same # as above*)
Breakdown of 10 Categories by dot totals...to prioritization.
Summarize verbally to group the 3-4 focus areas in 8 categories
Assignments (Club Action Plan)
Summarize and discuss observations to the extent that the group wishes...

Open the session:

Identify the Rotary-related experience level of all participants gathered for the facilitation. Consider saying: "I'd like to conduct a tenure check among all of you. We just want to know how long each of you has been involved in Rotary. Tell me if it's a month or years. Tell me, too, if you've been a member of the Rotary Family in other parts of the country or, for that matter, the world. So, then, what's your Rotary tenure?"

Go around the room, making the tenure inquiry of each participant as a form of "ice-breaker." (Even members of the same club may not know the longevity of their fellow Rotarians.)

By virtue of the responses, you will be able to:

- a.) Discern how "deep" individual experiences are***
- b.) Vary any subsequent explanations and examples of Rotary programs or activities to match the experiential level of those present***
- c.) Identify the most experienced members for any counsel and advice they can bring to the requisite Action Plans that later conclude the session.***

Power point Presentation

The Writing Exercise: Then present the writing exercise and give them 30 minutes to fill out. We give them the FULL 30 as some will still be thinking of things at the 29 minute mark.

Facilitator: During the PowerPoint presentation three key concepts were offered. What were these ideas? Hint--they all began with the letter "C."

[Draw out from the group the terms...Continuity/Consistency/Consensus. Review the importance of each with your own supporting examples or anecdotes as to the value of this planning Triangle. On the flip chart, draw a large equilateral triangle. Label the diagonal lines as Continuity and Consistency. The remaining term--Consensus--should be deliberately placed at the BASE of the triangle. It becomes visually obvious as to why this is a group undertaking and will be highly participative during the course of the evening.]

Facilitator: In a moment, you'll be asked to imagine the future--to place yourself 5 years from today and look back on the success of your Rotary Club. You'll be asked to "see" your club not as it is, but as it has become.

[Suggest that Facilitator incorporate any of the following quotes into the value of looking beyond today. Consider...

- Dreams get you into the future and add excitement to the present. (Robert Conklin)***
- Your hopes, dreams, and aspirations are legitimate. They are trying to take you airborne, above the clouds--above the storms--if you only let them. (Henry James)***
- Vision is the art of seeing things invisible. (Jonathan Swift)***
- If you reach for the stars, you may not grasp one. But you'll not come up with a handful of mud either. (Anon.)***

Facilitator: To help you focus on the next decade, I will distribute an exercise in a moment that you will be asked to complete. Just do the best you can in the time allotted. Be open, innovative, and imaginative.

[Hold distribution of the Exercise until you have read the complete cover sheet to the participants--it contains the "make believe" contest for the RI President's Distinguished Club Medallion.

Be slow; be deliberate; emphasize the directions, especially those describing how they must position themselves ten years out and look back to delineate what's been accomplished. Provide a brief review of the categories that they will address--these are pages 2-5. Then, distribute the exercise. Set timer for 30 minutes.

When time is consumed, allow for a short "stretch break." Reconvene the group and begin the "scribing" process. Encourage participants to offer a 3-to-5 word capsule of their response. The desired "capsule" can be given before or after their full response.]

Data Collection and Scribing:

"Extractor": The switching off is only for purposes of harnessing the "feedback" that the facilitator will be drawing out of the group. Remember to instruct the group to only speak one at a time and to respect the response of the individual talking. The process of drawing out the feedback will mean that the scribe(s) are first trying to grab the concept in the least number of words and then writing them on the flip chart. When your club members get excited about certain subjects they will start talking quickly and on top of one another...you as the facilitator **MUST manage this so the scribe has a "writing" chance.**

Scribe: The next part will be the collection and scribing of their written points for each of the areas of the written exercise. You will not ask them to prioritize anything at this point just share with the group what they have written for each of the exercise questions. Collect this information on the flip charts **ONE TOPIC at a time. The scribe will put a heading on the top of the flip chart for the area you are collecting... In other words the first flip chart (place a #1 in the upper right hand corner) will be titled "Club Stands For" in the community. You as the facilitator will go around the room asking each club member for what they view as what their club stands for in their community... Keep filling in the flip charts with headers and numbers until you have captured everything on the club member's exercises. The purpose of the written exercise is to have each member **INDEPENDENTLY** write down their perspective of their club; this is **NOT** a group fill-in. Once you have gathered all of the feedback on the flip charts the exercises can be thrown away or the respondents can keep them. The objective is to get the information independently created and group collected.**

SEE LEADERS GUIDE PART TWO FOR SAMPLES OF FLIPCHARTS

Give em a break...

Scribes...divide up the flip charts on the walls into the categories of the exercise so that when they vote with their 3 dots for Club Stands For they don't get confused... You may wish to write the number of dots they can use on each flip chart category so they know... we have instances where individuals have "stacked" their dots on certain category flip charts skewing the results. Now we are very adamant about accuracy with the dot exercise.

Multi-Voting “Dot Exercise”:

Now distribute the blue dots for voting and explain that only place the number of dots on each category as you have written on the sheet with only one dot to a line to the left of the statement (where your line created a box)... no stacking of your 3 dots on one line.

Following the first round (Blue round) of voting the scribes will take their markers and X out the voting square adjoining any statements to reduce the choices to 5-7 elements per Vision category. The Voting Facilitator will then distribute the Red dots for the second round instructing all participants that they can only vote on topics that do not have an X of elimination on.

The reason for the second round of dots is that we eliminate all statements that received zero to few dots on the first round. This process tends to really narrow down the focus for the future of the club resulting in the top 3-4.

- ***Guiding principles proposed for the Multi-voting exercise:***
 - ***Use consistent process for each group, regardless of the number of participants (this will be as valid as any other approach)***
 - ***Use the same number of dots for each category for each of 2 rounds***
 - ***Too many dots per category will slow down the process and not improve its value - the idea is to get consensus around which are the ideas most worthy of further work when there is no one clear "best"***
 - ***Use 3 dots for each category except 1 for Club size and 1 for Fundraising (while some might argue for more this, keeps the process moving, is as valid as 4, 5, or some other number for our purpose, gives us enough input to do our synthesizing based on clusters of dots, gives the Club enough focus to take next planning steps).***
 - ***The objective of the first round of voting is to bring the number of stated elements from whatever was posted on the wall charts down to 5-7 elements for the second round. Put an X over any elements that will be eliminated in the dot voting box to limit the choices on the second round to 5-7.***
 - ***Use 3 dots per category (omit Club size or Fundraising if need be) for the second round***
 - ***No "voter" may place more than 1 dot on any option/idea in each category***
 - ***In the synthesis look for options/ideas that might be combined or blended because they are related***
 - ***Suggest that they start at a chart (don't all start on the same one) and move clockwise around the room to avoid forgetting which area they have not voted yet***

Drawing Conclusions from the Data:

Go to each of the 10 areas, count the second vote of dots and identify the top 3 or 4 vote getters. With a different color marker, underline the key words. The summarizer will then give a verbal report on the top vote getters (or focus areas) for each area.

The ULTIMATE objective of this 3.5 hour Vision Facilitation is to take clubs that have gotten so diverse in their beliefs and practices that they are "rudderless" to a focused consensus at the conclusion of this event. You will even find that the club members will have an "elevator speech" for recruiting new members "hidden" in the outcome of "club stands for".

Club Action Plan Process:

To conclude the Vision Facilitation key actions must be identified and attach the people responsible for the actions as well as a reasonable timeline for the completion of these actions. These are the proposed 4 actions that must result from this facilitation.

ACTION	WHO	WHEN (Specific Date)
1. Compile the facilitation wall charts	John, our club secretary	2 weeks using the facilitation team provided Excel template
2. Create a vision statement or “elevator speech” for our club using the information gathered this evening.	Mike, Jenny and Sue	3 weeks (in preparation for our club assembly)
3. Schedule a club assembly to share what has happened	President Steve	Upcoming Quarterly Club assembly in 5 weeks
4. Assemble our President’s Development Team for a first meeting	Past-President Connie	Next month and once a quarter there after
5. Identify a club Vision champion		

Closing Remarks:

- ***This (name) Rotary Club team has accomplished a tremendous amount tonight.***
- ***In about 4 hours you have brainstormed and reached consensus on a set of priorities for near and long term action in each of the club’s service areas***
- ***It can, and should be,***
 - ***a platform for communicating with the whole club about the work you have done here,***
 - ***what it means as a platform for short and long term strategic and action plans***
 - ***and a way to help insure continuity and consistency of focus and action out into the future***
- ***As we close this session, let me ask you two questions:***
 - ***What doubts, worries, concerns, or reservations do you have about this evening’s discussion of strategy and action? [Listen to responses]***
 - ***What excites or energizes you most about this evening’s discussion of strategy and action? [Listen and affirm responses]***
- ***Thank the participants for their attendance and participation. Recognize that they have given their time and energy to create a focus for the future of their club, and in doing so have an impact on the future of their community.***

Sample slogan/mottos:

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

“We’re old, we’re bold, we’re going for gold” – response from a well established club in Minnesota USA

“We’re a drinking club with a community service problem” – Monroe, Washington USA

“Enhancing Opportunities for Youth – Creating a Better Community for All” – Hudson Daybreak, Wisconsin USA

“To Promote Friendship, Good Will and Good Works” – Lake Forest/Lake Bluff Morning – Chicago, Illinois USA

“Doin Good, Haven Fun...Maybe Both” – Palatine, Illinois USA

“We start on Time, We end on Time, We have a good Time” - Freemont Days End – Freemont, Washington USA

Welcome, Opening the session & Mealtime: Facilitator: Rules of the Room- Cell phones off, Bathroom locations, Respect other's views, One conversation, NO wrong answers or input, facilitator has right to change rules.

Ice Breaker: Identify the Rotary-related experience level of all participants gathered for the facilitation. Consider saying: "I'd like to conduct a tenure check among all of you. We just want to know how long each of you has been involved in Rotary. Tell me if it's a month or years. Tell me, too, if you've been a member of the Rotary Family in other parts of the country or, for that matter, the world. So, then, what's your Rotary tenure?"

Go around the room, making introductions, role in the club and the tenure inquiry of each participant as a form of "ice-breaker." (Even members of the same club may not know the longevity of their fellow Rotarians.)

PowerPoint Presentation:

Introduce the Written Exercise: Facilitator: During the PowerPoint presentation three key concepts were offered. What were these ideas? Hint--they all began with the letter "C."

[Draw out from the group the terms...Continuity/Consistency/Consensus. Review the importance of each with your own supporting examples or anecdotes as to the value of this planning Triangle. On the flip chart, draw a large equilateral triangle. Label the diagonal lines as Continuity and Consistency. The remaining term--Consensus--should be deliberately placed at the BASE of the triangle. It becomes visually obvious as to why this is a group undertaking and will be highly participative during the course of the evening.]

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.....
DOT VOTING EXERCISE: 32 dots on your sheet – start at a chart (not all people at same chart) – move clockwise – no stacking of dots on your favorite item – 3 dots for all areas except size and fundraiser each get 1 dot. Prep sheets for second round by putting an X over any elements that will be eliminated in the dot voting box to limit the choices on the second round to 5-7.

Closing Comments: It was a real pleasure to work with each of you this evening.... This (name) Rotary Club team has accomplished a tremendous amount tonight.

- ❖ In about 4 hours you brainstormed and reached consensus on a set of priorities for near and long term action in each of the club's service areas
- ❖ It can, and should be,
 - a platform for communicating with the whole club about the work you have done here,
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 - and a way to help insure continuity and consistency of focus and action out into the future

As we close this session, let me ask you two questions:

- What doubts, worries, concerns, or reservations do you have about this evening's discussion of strategy and action? [Listen to responses]
- What excites or energizes most about this evening's discussion of strategy and action?" (Listen and affirm)
- Thank the participants for their attendance and participation. Recognize that they have given their time and energy to create a focus for the future of their club, and in doing so have an impact on the future of their community.

ASSIGNMENTS FOR EVENING:

- Introduction -
- PowerPoint and Intro Writing Exercise –
- Extractors –
- Scribes-
- Dot Exercise –
- Summarizer –
- Action Plan –
- Closing –

**Bring Camera,
Exercises,
Handouts and
Extra Supplies**

The Event - Timeline

- 4:30 – 5:00 Arrival of facilitation team and set-up
- 5:00 – 5:15 Start Buffet line for meal or box supper and be seated for meal
- 5:15 – 5:25 Rules of Facilitation, Introduction Team; Club Members (*Name, Club role, Rotary experience*)
- 5:25 – 5:40 Present the PowerPoint Presentation (*while everyone is eating*)
- 5:40 – 5:45 Introduce Vision Exercise
- 5:45 – 6:15 Rotarians fill out the Vision Exercise
- 6:15 – 6:20 Short break for clean-up, bathroom break if need
- 6:20 – 8:00 Extraction of “22+ Sheets”
 - 6:20 1. *What does club stand for?* (3 Dots)
 - 6:29 2A. *Membership number* (1 Dot)
 - 6:31 2. *Membership because* (3 Dots)
 - 6:40 3 *Club Service* (3 Dote)
 - 6:49 4 *Vocational Service* (3 Dote)
 - 6:58 5 *Community Service* (3 Dote)
- 7:07-7:12 **BREAK AND SWITCH EXTRACTOR**
 - 7:12 6 *International Service* (3 Dote)
 - 7:21 7A *Fundraising amount* (1 Dot)
 - 7:23 7. *Fundraising events, methods* (3 Dots)
 - 7:32 8. *Public Relations* (3 Dots)
 - 7:41 9 *The Rotary Foundation* (3 Dots)
 - 7:50 10 *Leadership Development* (3 Dots)
- 8:00 – 8:05 Break - (*cross out redundant statements, MOVE elements that are in the wrong category*)
- 8:05 – 8:20 Round 1 - Blue Dot prioritization on each of the 10 Categories **32 dots per participant**
- 8:20 - 8:30 Round 2 - Red Dot prioritization on each of the 10 Categories **32 dots per participant**
- 8:30 – 9:00 (Team circle top 3-4 Items in each category)
Summarize verbally to group the 3-4 focus areas in 10 categories
Assignments (Club Action Plan)
Summarize and discuss observations to the extent that the group wishes...

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4. Assemble our President’s Development Team for a first meeting	Past-President Connie	Next month and once a quarter there after
5. Identify a club vision champion		