



Rotary D-5340 Strategic Planning Team Club Facilitation Overview

1. **Desired Number of Participants:** 15 – 20 club members including past and future Presidents and board members, as well as some newer members. The minimum number that we can work with is 12. **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, if at all.
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. **Items 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.
 - 20 – 25 tent cards with attendees’ names printed LARGE
 - 2 Easels with full sized Post-It Easel Pads
 - Projection Screen
 - Projector for use with a laptop
 - Ext. Cord w/ multiple plug in
 - 600 – Color Code Label Dots (3/4” in diameter sized) – Dark Blue
 - 600 – Color Code Label Dots (3/4” in diameter sized) - Red
 - Variety of blunt “permanent” Colored Markers
 - Scissors
 - Pens for filling in Exercise for each participant
 - Roll of Masking Tape

6. Items Provided by Facilitators -

- Computer questionnaire provided to club prior to facilitation
- 20-25 Facilitation Exercises customized to the club
- 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

Thanks for the opportunity to serve your club,

Louise Andres, District Governor Nominee Designate, Strategic Planning Chair

Dale Bailey, District Administrator and Trainer

Susan Bleicher, District Vocational Chair

Dave Breeding, Past District Governor

Marge Cole, Past District Governor

Luene Corwin, Past President San Marcos

Dianne Crawford, Past President SE San Diego

Kate DuVivier, Past President Encinitas Coastal

Russ Hanthorn, Past President Carlsbad

Sheila Henry, Past President La Jolla Sunrise

Kendra Jeffcoat, Past President Rancho Bernardo

Marta Knight, Past President Chula Vista Sunrise

Mark Kilpatrick, Member, San Diego Coastal

Janice Kurth, Past President Del Mar

Paul Pierce, Past President Encinitas

Maurice Rahimi, Past President Rancho Santa Fe

Pam Russell, Past District Governor

Marilyn Sanderson, Past President La Mesa Sunrise

Bill Stumbaugh, Past President Santee-Lakeside

Larry Sundram, District Governor

Time Line for Event:

1. The Rotary Club requesting a Strategic Planning Event will identify a “**Club Coordinator**” that will coordinate the entire event **before** any event planning activities begin.
2. The District Strategic Planning Team Coordinator will establish contact with the Club Coordinator to **set the date for the facilitation event.**
3. Rotary Planning pre-survey (*link sent to facilitated club coordinator **30+ days preceding facilitation with the expectation that will be completed by the club 2 days before scheduled Facilitated Event.***)
4. Survey information is summarized by the Vision Team Coordinator for use by the Vision Team facilitation.
5. 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.
6. **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.

The Event - Timeline

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| 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/break |
| 6:00 – 6:10 | Introduce Strategic Planning Exercise |
| 6:10 – 6:40 | Rotarians fill out the Strategic Planning Exercise |
| 6:40 – 8:00 | Brainstorming from exercise |
| 8:00 – 8:05 | Break |
| 8:05 – 8:30 | Prioritize strategies |
| 8:30 – 9:00 | Summarize verbally to group the 3-4 focus areas in each of 10 categories Assignments (Club Action Plan) Discuss what next ☺ |