TM VISION FACILITATION

VISIONING IN ACTION

STRENGTHENING YOUR CLUB & PREPARING IT FOR THE FUTURE

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What is Club Visioning?

A fun and great 4-hour event to plan a club's future.

Everyone participates and contributes!

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A Visioning Event

Provides An Opportunity

For Engaged Members

To Create A Shared

Vision For Their Future



Why Club Visioning?

- Annual leadership cycles can be problematic
- Establishes a multi-year, coordinated plan
- Provides greater continuity, consistency, and consensus

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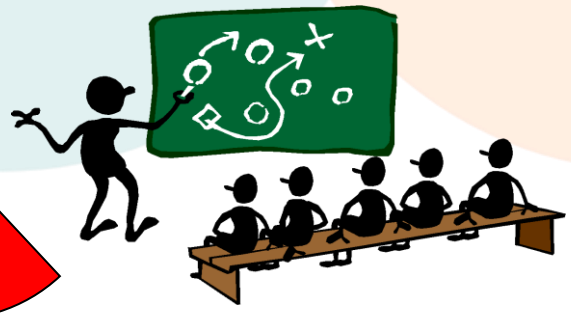
Rotary Club Visioning Process

Vision



1) Club Visioning Event

3-Year Master Plan



2) Follow-up Meeting

Action Plans for each Goal/Project



3) Follow-up Club Assembly

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Visioning Process

1) Who are we?
2) Where are we?
3) Where do we want to be?
4) How will we get there?
5) How will we know when we have arrived?

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CLUB VISIONING EVENT

- ❑ INTRODUCTIONS
- ❑ VISIONING OVERVIEW
- ❑ EXTRACTION AND SCRIBING
- ❑ VOTING
- ❑ SUMMARIZATION
- ❑ PLANNING
- ❑ NEXT STEPS (Follow-up Sessions & Actions)



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EVENT FACILITATION TEAM

- ❑ Gretchen & Gary Bren
- ❑ Carol Horner
- ❑ Julie O’Hara
- ❑ Roxy Orr
- ❑ Mick McKinley
- ❑ Mark Ellsworth
- ❑ Rob Simmon

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ROTARY INTERNATIONAL VISION STATEMENT



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ROTARY'S ACTION PLAN

VISIONING EVENT ALIGNMENT



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Mental Time Travel

- We imagine ourselves in the future
- We Use Past Tense….Action Verbs….

  (We achieved, We gained, We created, etc.)

See our club, not as it is, but as it has become three years in the future!!!

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CLUB VISIONING/PLANNING - SUMMARY

- **HOW – Participants jointly develop ideas for their Club's Vision during the Visioning Event**
- **WHAT – Club members develop Master & Action Plans for each goal in two sessions following the 4-hour Visioning Event**

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Club Visioning Builds Successful Clubs

Outcomes and Benefits:

1) Creates a shared Club Vision & 3-year Plan
2) Retains & even increases the number of members
3) Initiates & executes successful projects
4) Supports the Rotary Foundation
5) Develops leaders for the club and for Rotary
6) Promotes Fellowship, Engagement, and Fun!

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Top Vision Ideas from Club Visioning

EXAMPLE

Increase Our Ability to Adapt
- Premier civic organization in the town
- Cooperation with other service groups
- Alternate meeting times

Expand Our Reach
- Add net 4 new members
- Promote community awareness of the Club

Enhance Participant Engagement
- Create Membership and Retention committee
- Send Club delegate(s) to the Rotary International Convention

Increase Our Impact
- Engage club and community in identifying a signature service project
- Send two students to Camp RYLA

Fundraising
- Golf Event 10K
- Food Festival 15k

Rotary Foundation
- Every Rotarian Every Year contribution to the Rotary Foundation

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Create a Club Master Plan

EXAMPLE

XXXX Rotary Club Master Plan – (Where do we want to be?)

Design multi-year coordinated plans for continuity, consistency, and consensus.
Prioritze the top Visioning ideas by Rotary Year to set Club focus. Once the Club has approved the Master Plan, each idea will need an Action Plan.

	Top Ideas for Year 1:	Who will Lead			Top Ideas for Year 2:	Who will Lead:			Top Ideas for Year 3:	Who will Lead:
1	Create a Membership and Retention committee	Membership Chair		1	Engage Club in identifying signature project	Club and Community Chairs		1	Develop and initiate signature project	Club and Community Chairs
2	Work toward net 4 new members by 20xx	Membership		2	Work toward net 4 new members by 20xx	Membership		2	Added net 4 new members	Membership
3	....			3						
4	....							4		
5	....									
6	Send 2 Club delegates to RI convention	Club Board		6	Send 2 students to Camp RYLA	Youth Chair		6	Promote community awareness of Club	Public Image

Develop a Master Plan from the Vision Template

Identify top Vision ideas as priorities for each of the 3 year to focus on
Some Vision ideas may be listed in all three years (ongoing or Phase 1, Phase 2, etc.)
Not all the Vision ideas need to be on the Master Plan
Work will be happening on other Vision ideas during the years

Rotary International Action Plan Priorities

- **Increase Our Ability to Adapt**
- **Expand Our Reach**
- **Enhance Participant Engagement**
- **Increase Our Impact**

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Develop an Action Plan EXAMPLE

ACTION PLAN – **Example** (How will we get there? How will we know we've arrived?)

Execution: Who will do What by When?

Goal: **Send Club Delegate(s) to the Rotary International Convention in May 2028**		***Where do we want to be?***				
Actions/Tasks (What has to happen?)	***Who is in the Lead?***	***Who else will help?***	***Resources needed***	***Start Date***	***End Date***	***Comments/Status Report***
Share promotion on the upcoming RI convention with the Club	President		None	7/1/27	7/30/27	
Ask at Club meeting for who might be attending	President	President	None	8/1/27	8/15/27	
Select Club delegate(s) and approve funding	Board		RI Convention budget	8/16/27	9/31/27	
Register and arrange travel	Delegate(s)	Treasurer	RI Convestion budget	10/1/27	11/31/27	Early Registration lowers cost
Attend the RI Convention	Delegate(s)			5/27/28	5/31/28	
Schedule RI convention report to Club	Club Chair	CLub Program Coordinator		06/01/28	06/30/28	

OUTCOME	Presentation by delegate of their Rotary International convention experience at a Club meeting	**How will we know we've arrived?**

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PANEL DISCUSSION

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