

VISION FACILITATION

ROTARY District 5030 PETS

Visioning: Opening Exercise

“Why Rotary...”

(One 2-Minute Round)

District 5030 Visioning Facilitation Team

❖ Danielle Pratt
Mill Creek Rotary Club
Past Club President
Past AG

❖ Bill MacCully
Shoreline Rotary Club
Past Club President
Past and Current AG
District Visioning Chair Elect

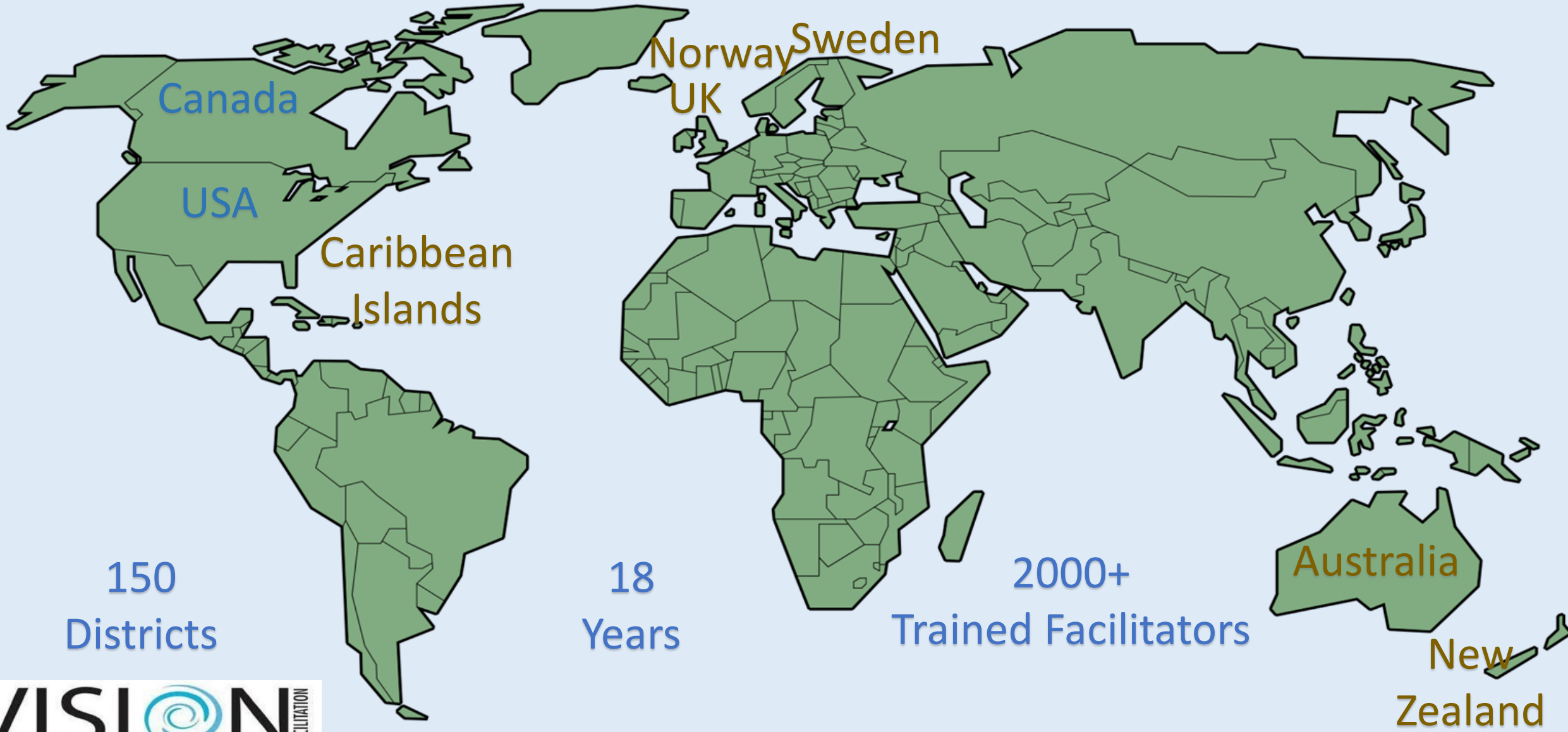
❖ Alan Fulp
Bellevue Rotary Club
Past Club President
Current AG

❖ Leo Muller
Lake Union Rotary Club
Past Club President
District Visioning Chair

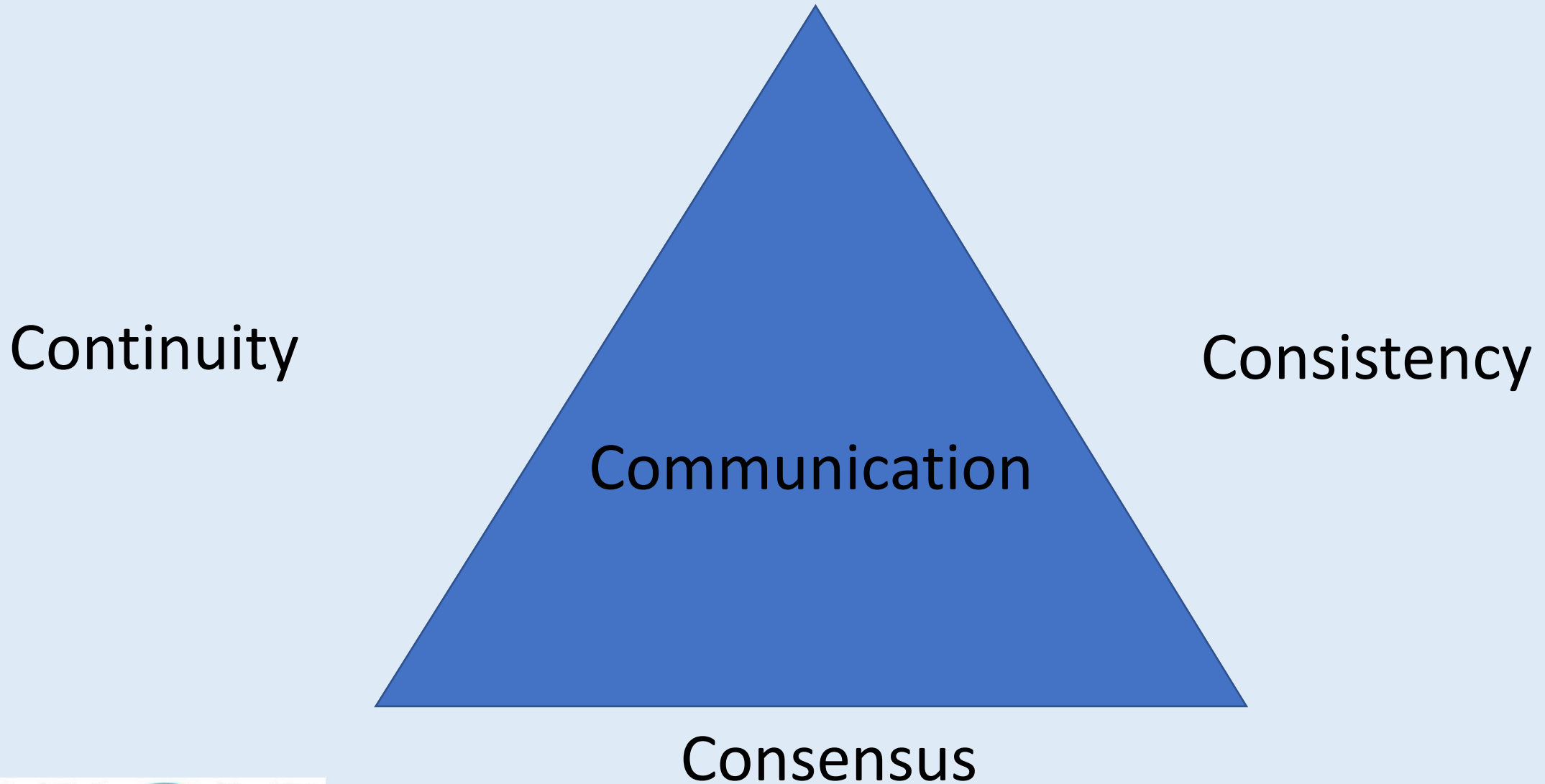
❖ Steve Lingenbrink
Bellevue Eastside Rotary Club
Past Club President, Past AG,
Past District Governor
Too Many Other Roles to List
Unofficial Advisor

❖ Your Club's AG when you have
your Visioning Event

Visioning Across the World



3 Key Concepts for Visioning



ROTARY INTERNATIONAL VISION STATEMENT



TOGETHER WE SEE A WORLD
WHERE **PEOPLE** UNITE AND TAKE ACTION
TO **CREATE** LASTING
CHANGE ACROSS THE GLOBE
IN OUR COMMUNITIES AND IN OURSELVES

ROTARY'S ACTION PLAN

Increase
our impact.

Expand
our reach.

Enhance
participant
engagement.

Increase our
ability to adapt.

WHY SHOULD WE HAVE AN ACTION PLAN?

Because having one helps you plan out step by step, how your club will get to where it wants to be.

Alice and her conversation with the Cheshire Cat in Lewis Carroll's *Alice in Wonderland*.

The Visioning Process will help your Club decide which way you want to go.

Process & Outcomes

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?

The focus is on where you want your club to be in three years.

Examples of Specific, Achievable Goals

- Send two students to RYLA in 2025
- Increase our membership to 45 people by 2027
- Raise \$15,000 for Harvest Against Hunger in 2024-2025
- Write a Global Grant & have it approved by July 2025

The Master Plan

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



Design multi-year coordinated plans for continuity, consistency and consensus

Place the Visioning ideas on the plan to show the results to the club. Once the club has approved the Master Plan, each idea will need an Action Plan.

Our 1st Year Ideas/Goals:

Our 2nd Year Ideas/Goals:

Our 3rd Year Idea/Goals:

Goals for the Year:

Who will Lead:

Goals for the Year:

Who will Lead:

Goals for the Year:

Who will Lead:

| | | | | | | | | |
|---|--|--|---|--|--|---|--|--|
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| 2 | | | 2 | | | 2 | | |
| 3 | | | 3 | | | 3 | | |
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| 6 | | | 6 | | | 6 | | |
| 7 | | | 7 | | | 7 | | |
| 8 | | | 8 | | | 8 | | |

Develop a Master Plan from the Vision Template:

Some goals may be listed in all 3 years (either ongoing or Phase 1, Phase 2, etc.)

Each Goal will have an Action Plan (Who will do what by when?)

Use a separate Action Plan sheet for each of the goals

Goals may need to be adjusted as the plan unfolds

You will need to Monitor Progress (see Vision to Success Guide)

The Planning Process Questions:

Who are we?

Done

Where are we?

Done

Where do we want to be?

Master Plan

How will we get there?

Action Plans

How will we know we've arrived?

Outcome Achieved

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The Action Plan

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



Execution: Who will do what by when?

| GOAL | Where do we want to be? | | | Start Date | End Date | Comments/Status Report |
|------|--|---------------------|---------------------|------------|----------|------------------------|
| | Actions/Tasks (What has to happen?) | Who is in the Lead? | Who else will help? | | | |
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|---------|--|---------------------------------|
| OUTCOME | | How will we know we've arrived? |
|---------|--|---------------------------------|

Develop an Action Plan from each goal on the Master Plan:

- Actions/tasks – try to list in order, knowing that some new steps may become apparent
- Actions/Tasks – consider using an action verb (suggests movement)
- Actions/Tasks – break down bigger tasks into a list of smaller tasks if needed
- Actions/Tasks – be mindful of potential obstacles. List alternative ideas in comments
- Actions/Tasks – develop timelines
- Actions/Tasks – define resources: funds needed, partners to involve, connections to make
- Actions/Tasks – describe the outcome
- Actions/Tasks – monitor progress (see Vision to Success Guide)

The Planning Process Questions:

- Who are we? Done
- Where are we? Done
- Where do we want to be? Master Plan
- How will we get there? Action Plans
- How will we know we've arrived? Outcome Achieved

Vision to Success: Next Steps

1. Gather ideas with which to move forward
2. Create a Club Statement of Purpose
3. Create the Master Plan
4. Share Club Visioning results with the club
5. Choose a Club Impact Leader or Club Impact Team
6. Create an Action Plan for each goal in the Master Plan

Visioning Outcomes

- What the club stands for in its community
- The club's target membership size in 3 years
- Ideas that become goals based on 2-step voting process
- A process to prioritize and manage set goals through a Master Plan and Action Plans
- Excitement throughout the club for what it is becoming

District 5030 Clubs Served

Established, new, cause-related,
and/or virtual clubs

- Sammamish Rotary Club
- North Creek Rotary Club
- Rotary Club of the PNW Ending Sex Trafficking
- Northshore Rotary Club
- Environmental Rotary Club of Puget Sound
- Bellevue Rotary Club
- Maple Valley Rotary Club
- University District Rotary Club
- Auburn Rotary Club
- Burien-White Center Rotary Club

District 5030 Clubs in Discussions

- Lake Forest Park Rotary Club
- Covington Rotary Club
- PNW Partners for Work Rotary Club

District 5030 Clubs Cancelled/Postponed

- West Seattle Rotary Club
- Renton Rotary Club
- Lynnwood Rotary Club

In Closing

- Q & A
- Summary
- Visioning Team Membership
- Next Steps

In Closing

To book your club for Visioning:

Leo Muller, Visioning Chair or Bill MacCully, Chair-Elect
lmuller@choices.org billmaccully@gmail.com

206-300-6802

206-618-7000

Thank You

We look forward to
serving your club!

