



The Club Vision Facilitation Process

Long Range Planning for your Rotary Club.

District 9800 Training Assembly

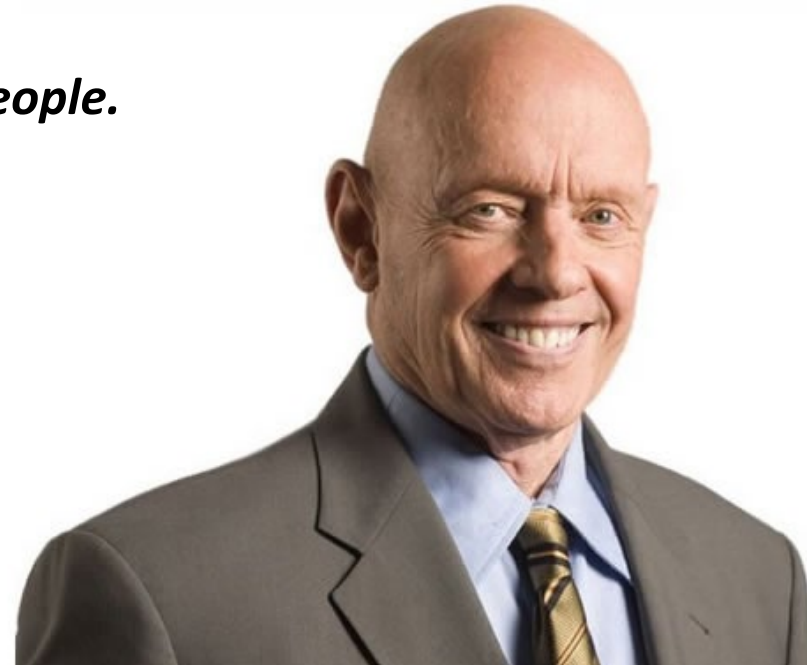
Sunday 26 May 2019



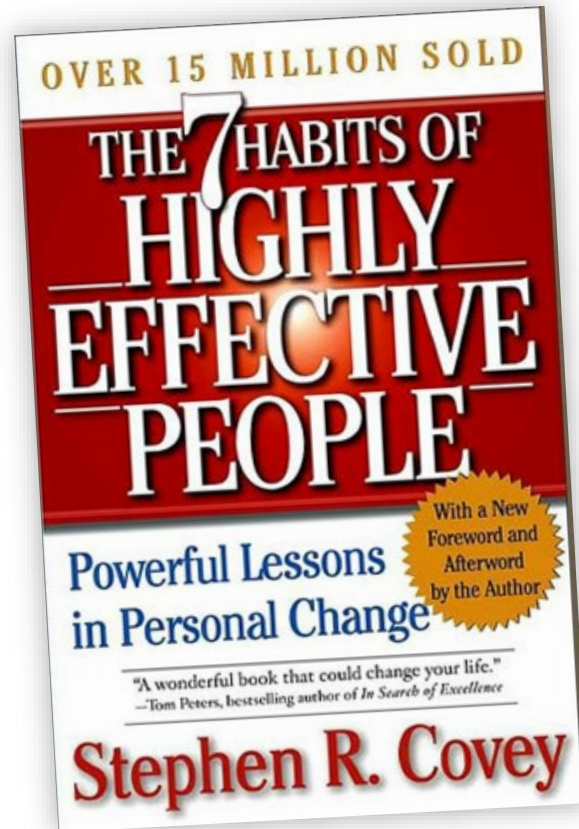
Stephen Covey (1932 – 2012)

American academic, businessman, keynote speaker
and author of:

- *The 7 Habits of Highly Effective People.*
- *First Things First*
- *Principle-Centered Leadership*
- *The Leader In Me*
- *The 7 Habits of Highly Effective Families*



Stephen Covey (1932 – 2012)



The **7** Habits of Highly Effective People

1. Be proactive
2. Begin with the end in mind
3. Put first things first
4. Think win-win
5. Seek first to understand
6. Synergize
7. Sharpen the saw

Start with the end in mind ...

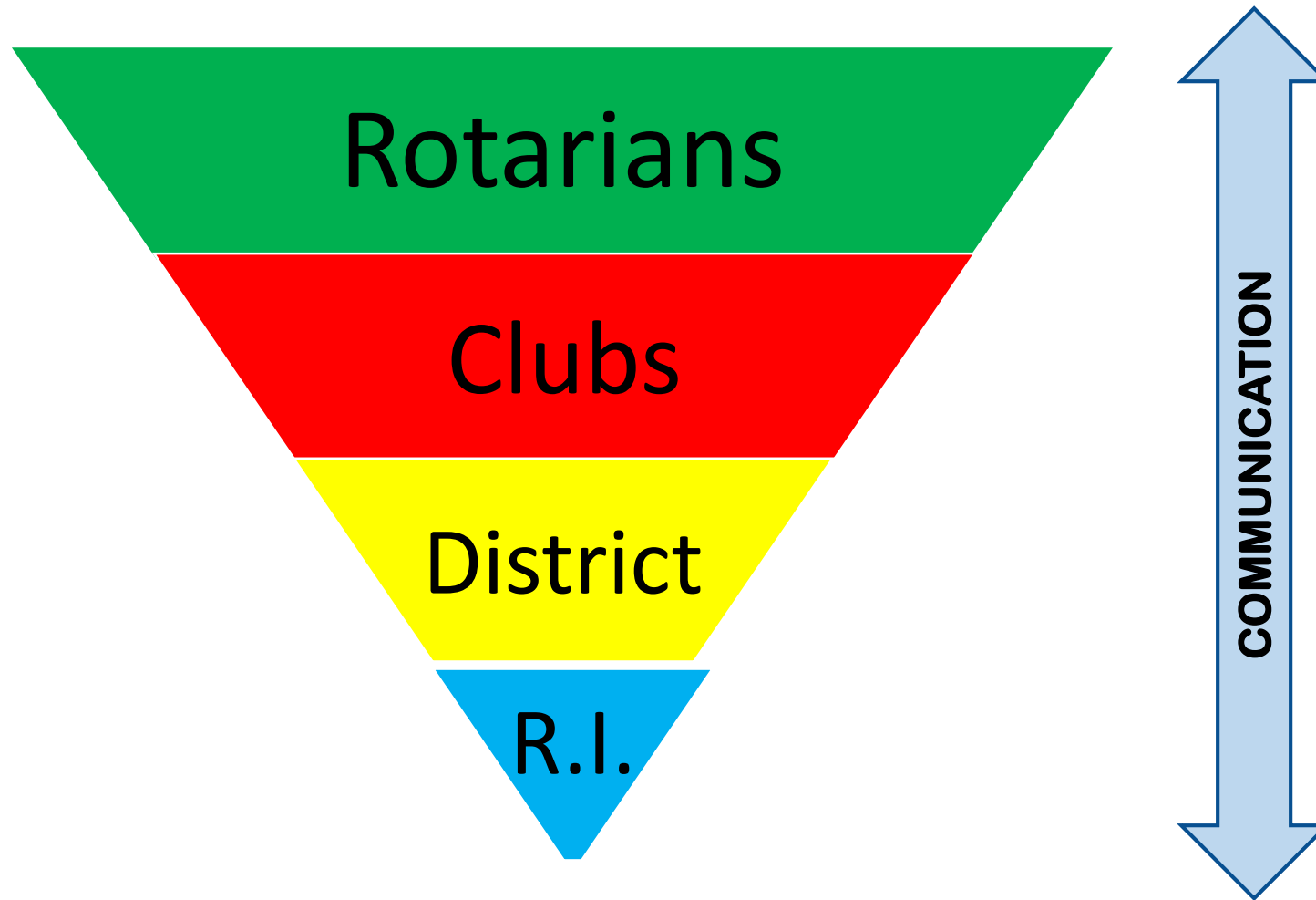
.... means to **begin with a clear understanding** of your destination so that the steps you take to make things happen are always in the right direction.

All things are created twice, mentally and physically. We create them first in our minds, and then we work to bring them into physical existence.

Stephen Covey



Rotary happens at Club level



Characteristics of effective clubs

By starting with the end, in mind successful clubs:

- 1) Sustain and increase membership
- 2) Implement successful service projects
- 3) Enhance the public image & awareness of Rotary



- + Develop leaders in the club and beyond
- + Support the Rotary Foundation

Characteristics of effective clubs

..... and develop long-range plans which create:

- **Continuity** of leadership, vision and process
- **Consistency** in programming & projects
- **Consensus**, solidarity and unanimity of purpose and action




What is your club like? ...

- ✓ Does it stand out and make you proud?
- ✓ Are your members open to new ideas?
- ✓ Are your members engaged? Diverse?
- ✓ Does your club have long range plans & do new things?
- ✓ Does the club have good communications?
- ✓ Are members engaged with higher levels of Rotary?
- ✓ Are your meetings fun and lively?



When did your club last undertake a health check?

YOUR CLUB EXPERIENCE



Members who have a positive Rotary experience are more likely to stay. In turn, they create a positive Rotary experience for others, because their enthusiasm is contagious. If your club's members genuinely enjoy being a part of the club, you're on the right path. Your experience includes not just your club meetings and other activities, but also the connections you've made and your pride in Rotary's work.

☐ I look forward to attending club meetings.

☐ Our club meetings are enjoyable.

☐ We have a great club atmosphere.

☐ Our meetings are well organized.

☐ Members sit at tables.

☐ Some of the members are new.

☐ Members other than Rotarians are present.

☐ Most members are active.

☐ Our members contribute to the club.


☐ We raise funds for our club.

☐ We recognize members.

☐ I have made international contacts.

☐ Our club tries to meet the needs of its members' experience.

IMAGE



Clubs that have fun and make an impact are attractive to those who see that. A positive public image improves your club's relationship with your community and prospective members. Make sure your club is getting the credit for the service you provide. Demonstrating that your club meets real needs confirms your value to your community.

☐ We have an online presence, including a public-facing, visually appealing club website, Facebook page, or other social media page that explains what the club does, who its members are, and the benefits of membership.

☐ Our club has members dedicated to public image.

☐ Our club appeared in the local media multiple times.

☐ We promote our club and Rotary through various media.

☐ Our club invites members of the media to cover our activities.

☐ Our club materials follow Rotary's updated branding.

☐ We use branded materials and templates from Rotary.

☐ We use marketing materials provided by Rotary, including videos, images, and logos.


☐ We display Rotary signs and banners at our meetings.

☐ Our club's presence is known in our community.

☐ We have a customized brochure that we give to new members.

☐ We use Rotary Showcase to promote our finished projects.

BUSINESS AND OPERATIONS



When your club runs smoothly, you likely have good leaders who are looking toward the club's future. The leaders shape the club as a whole, and it's crucial to have skilled people in those leadership positions. For this reason, leadership development is also a way to fortify your club.

☐ We have a strategic plan for our club that we update regularly.

☐ We have annual goals and enter them in Rotary Club Central.

☐ Our club has committees that support the activities and regularly report to the club board on progress toward goals.

☐ Our club board changes what isn't working well and updates club bylaws accordingly.

☐ We have a process for ensuring continuity that includes preparing members for leadership positions, documenting procedures, and involving current, past, and future leaders in decisions.

☐ Our club president attends PETS, and club leaders attend the district training assembly.

☐ Members attend district events and seminars on Rotary topics that interest them.

☐ New members are officially inducted and are presented with appropriate materials.

☐ At least half of our club's members have a My Rotary account.

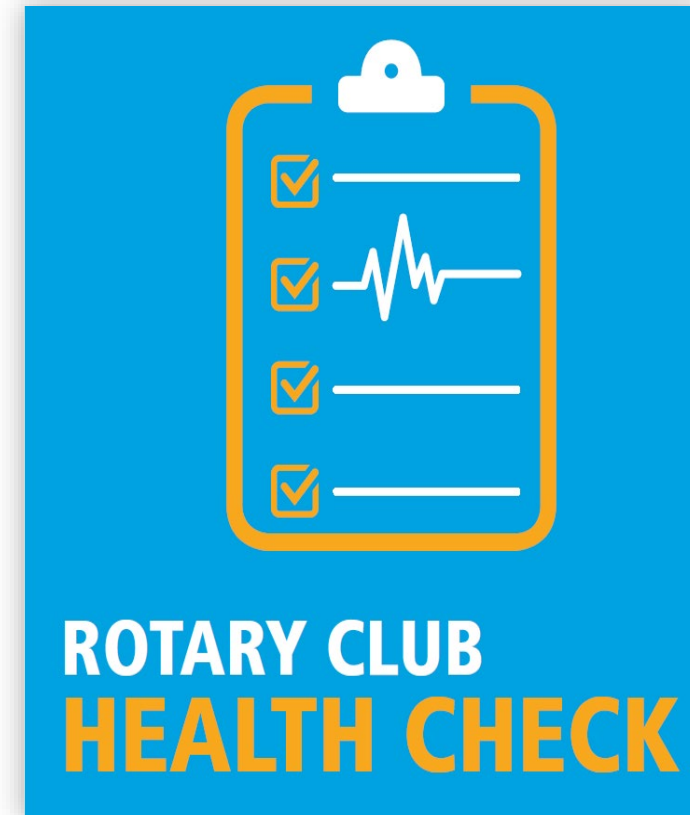
☐ Club officers conduct Rotary business using My Rotary or integrated club software.

☐ Our club sets and approves a budget for the upcoming Rotary year, designates a treasurer, and keeps separate bank accounts for administration and fundraising or project funds.


☐ Our club sets and achieves fundraising goals using a variety of fundraising activities.

☐ We ask our members to complete a member satisfaction survey each year.

☐ We offer ongoing learning opportunities for our members.

A graphic for the Rotary Club Health Check. It features a blue background with a large orange clipboard icon. The clipboard has a white checklist with four items, each preceded by a checkmark. The first item is a blank line, the second is a heart rate line, the third is a blank line, and the fourth is a blank line. Below the clipboard, the text "ROTARY CLUB HEALTH CHECK" is written in large, bold, white and orange letters.

<https://my.rotary.org/en/document/rotary-club-health-check>

Rotary 

Club Vision is ...

- A structured process to help members develop a **shared commitment** for the future of their club.
- Helps clubs to establish **goals and objectives**.
- Helps clubs to move clubs up the “**vibrancy scale**”.
- Optimizes use of **resources**.
- An **ongoing process**.



*With everyone pulling in
the same direction with a
common destination in mind.*

Visioning is NOT.....

- Just about getting new members into your club.
- Something imposed on you by the District or R.I.
- A quick fix.



Vision To Plan Process



Why Is A Plan Needed?

- Rotary's tradition of annual cycles is not always effective.
- Encourages clubs to move forward instead of *“re-inventing the wheel”*.
- A multi-year coordinated plan should make a club more effective and vibrant.
- Encourages new leaders to step forward.



Benefits of a Club Vision Session

- ❖ ALL club members can have a say in their club's future.
- ❖ The attributes of your club will be defined.
- ❖ A 3 year membership target will be defined.
- ❖ The top 3 objectives for each *Avenue of Service*.
- ❖ Enhanced knowledge & understanding of Rotary amongst club members, especially new ones.



Why Club Vision doesn't always work.

- ❖ Rotarians wrongly believe their club's "vision" is being imposed on them by the District or Rotary International
- ❖ Club leaders don't promote it to their members.
- ❖ Club members expect the session to solve the club's problem in one sitting.
- ❖ Low member attendance or poor crosssection of members at the session
- ❖ Poor Rotary knowledge
- ❖ Lack of follow up:—
writing up, a club assembly,
strategic plan and acting on it.



How Good is Club Vision?

- *“The session generated a great deal of enthusiasm and gave the club a point from which to rebuild and progress.”*
- *“It’s so simple, it actually works; the process is sound and easy to follow.”*
- *“It’s amazing that we came to consensus in such a short time from such a diverse group.”*



THANK YOU

