

## Vision to Success Guide

**(Includes: How will we get there? How will we know we've arrived?)**

Here's where leadership really counts! Below are some elements to help encourage the plan to succeed beyond expectation this year and in the years to come!

At the Visioning event, you looked at six next steps to help the club and its members move forward:

- 1. Gather the list of top ideas you plan to move forward with**
- 2. Create a Club Statement of Purpose or Motto**
- 3. Establish a Process and then develop the Master Plan**
- 4. Share Club Visioning results with your club**
- 5. Choose a Club Impact Leaders or Club Impact Team**
- 6. Create an Action Plan for each idea in the Master Plan**

Below is a guide to assist you with each of the next steps to help you move forward from Vision to Success:

- **Gather the list of ideas from the Visioning session that you plan to move forward with**
  - Generally these would be the **top 2-4 items from each area of the voting**. Every club will be different in how many ideas the club chooses to move forward.
  - You will need to look through the ideas and decide which you would like to move forward into your 3 year plan.
  - You might also consider that there may have been some ideas that came up that were not top vote getters, but that should be added into your plan (such as club diversity was the idea, but "sub" ideas were 50/50 men/women, age diversity, club reflects community diversity).
  - Keep the entire list as you may wish to revisit it over the course of the three years.
- **Create a Club Vision Statement of Purpose or Motto**
  - Often this comes from these areas of the Writing Exercise:  
**What does your club stand for? What are your club attributes?**
  - You assigned someone at the visioning session **to lead a group** to work on a motto, slogan, **statement** of purpose, or whatever it is that works for YOUR club culture.
  - Some clubs even have a competition with teams or individuals in the club, but eventually this should be something that club members embrace and allows them easily and quickly to answer the question: **What/Who is Rotary in YOUR community?**
- **Establish a Process and then develop the Master Plan (FORM attached)**
  - Decide how and who will be a part of healthy discussions about what ideas that came out of the visioning that can be accomplished in year one, year two, and year three **PRIOR** to presenting the results to the general club members (so discussion and/or buy-in can occur when the results are presented to the club).
  - Group should include the **President Elect and Nominee** as the plan should continue to move forward in their leadership years.
  - Keep in mind that some of these ideas may be active in all three years (that is: phase 1, 2 and 3, or an ongoing effort, or start small and grow larger such as a fundraiser, etc)

-Some of the ideas can be as simple as continuing and/or expanding existing programs or as bold as brand new projects, fundraisers, or innovative changes (such as family memberships or changing the meeting time). Each of these should still appear on your Master plan.

-The Master Plan is a guide to give members the idea of an **overall plan for three years** and then the Action Plans break down these ideas to manageable tasks. This process helps the club feel confident in goal attainment instead of being overwhelmed.

- **Share Club Visioning results with your club (CUSTOMIZABLE POWERPOINT attached)**

-Use the PowerPoint attached to fill in YOUR Visioning results, including a DRAFT of your Master Plan (others in the club may want to give input when they see this).

-Present this at a club meeting relatively soon after the Visioning event. A group of Rotarians who attended the Visioning event should be **involved** in the presentation (so the club does not see this as one person's version of the future).

**-Ask for the Club's Commitment to the results:** Ask some of the same questions that you heard at the visioning session: What excites you about this? What does this mean for our club? What does this mean for our community? What is one thing we can do today (hopefully PLANNING is the answer)?

-When you present the results, you might consider having **sign-up sheets available** so that club members who are excited about a specific goal can sign up that day to participate.

- **Choose a Club Impact Leader or Club Impact Team**

-Consider a Club Impact Leader (or Team) that would be an individual who or committee that takes on the role of championing the goals (should be at least a couple people who were at the event, possibly incoming leaders of the club, maybe a newer, enthusiastic club member, etc)

-This Impact Leader or Impact Team has the task of **keeping the plan alive** and will not allow it to be set aside on the proverbial "shelf".

-While some Impact Leaders or Impact Teams will take a stronger role than others, it is important to have somebody or a team who would be willing to keep bringing up the question: **How are we doing to move our plans forward?**

-Part of this role is simply to keep asking about, prodding, and nurturing the plan

-Ask your **Assistant Governor** to help with encouragement

- **Create an Action Plan for each idea in the Master Plan Column Year 1 (FORM attached)**

-Take the "idea" from the Master Plan and form an Achievable Goal for each idea you want to accomplish in the **first year**.

-Each goal should be realistic, measurable, and have a timeline stating "**who will do what by when.**"

-Each goal should have a separate Action Plan.

-The goal can be developed by an existing committee, an individual, a group of individuals, the board, who else? (keeping in mind that buy-in often is stronger if someone is part of developing the goal)

-Decide who will take each Goal and work to create the Action Plan

-The Action Plan states the tasks that must be accomplished in order to achieve the goal

-It asks for someone to be responsible for that goal

-It asks who will help with goal attainment

-It asks if any resources will be needed

-It asks for a beginning and ending date

-It also helps monitor progress in case changes need to be made

-See the Action Plan **template for assistance on development**

- **Track the progress and Outcomes Achieved!**

- Decide how/when you will revisit the Master Plan to start working on **year two ideas**
- Go through the same process as above for development of the goals and Action Plans for year two, and **eventually year three.**
- Encourage updates to the club members on year one goals so they know the Action Plans are moving forward
- RECOGNIZE those who are actively moving the Action Plans forward
- CELEBRATE progress by identifying milestones towards the Outcome

## **HOW TO KEEP THE PLAN ALIVE:**

### **SOME THOUGHTS ABOUT HOW TO KEEP THE PLAN BUZZING, BOTH INSIDE THE CLUB AND OUT IN THE COMMUNITY BY EMPHASIZING WHAT IS HAPPENING AND WHAT IS COMING UP:**

#### **COMMUNICATION (IDEAS IN NO PARTICULAR ORDER):**

- Social media (in and out)
- Press release: The Rotary Club of XXXX came together and here is what they want to accomplish in our community in the next 3 years. If you are interested, contact XXX (in and out). If your plan is relevant to your community, it becomes an attraction tool for others that want to accomplish the same thing.
- Club bulletin/website/special email updates (in club)
- Announcements from “Goal” chairs at meetings (in club)
- Board meetings (in club)
- Local “out of club” announcements/flyers (newspaper, city hall, churches, schools, anywhere locals gather to update them about what is happening) (out of club)
- Partners (other NGO’s, local government, schools, etc) who are or could have a vested interest in your goal attainment (in and out)
- What else works in YOUR community?

## **OTHER THOUGHTS**

On occasion, (Quarterly? Annually?) restate your goals, dreams, vision, or what the future looks like to help re-engage current members and help add NEW members.

Think guidelines vs rules, enrollment/empowerment vs delegation, passion vs work. If members are as excited about the club accomplishing the goals as the club leadership is, it is far more likely to succeed.

Connect with District Vision Facilitation team if questions or concerns on how to proceed.

Engage your Assistant Governor as a resource and for support.

# 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 1<sup>st</sup> Ideas/Goals:

## Our 2<sup>nd</sup> Ideas/Goals:

## Our 3<sup>rd</sup> Year Ideas/Goals:

Goals for the Year:

Who will Lead:

Goals for the Year:

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Goals for the Year:

Who will Lead:

1	Increase Youth services-Sponsor a RYLA student	Youth Services Chair	1	Increase Youth services-Exchange student		1	Increase Youth Services-add 2 <sup>nd</sup> scholarship	
2	Obtain 8 new members	Membership Committee	2	Obtain 8 new members		2	Obtain 8 new members	
3	Public image-let community know about our 3 yr plan	President Sue	3	Have community leaders attend weekly programs		3	Billboard to tell community what we accomplished	
4	Hold socials that include family	Joe/Cathy	4	Establish a Satellite club		4		
5	Send 3 people to District training	Tom	5	All board members attend one District event		5	Five members of club attend International Convention	
6	Expand our Food shelf program with a District Grant	Tami	6	Start a 4 way test event to recognize local leaders		6		
7	Work with neighbor club on International service project	Bret and Tina	7	Do a project with Books for Africa		7	Submit a global scholar from our community	
8	Have every Rotarian give to the Rotary Foundation	Foundation committee	8	Have a Taste of our Community fundraiser		8	Start a local Club Foundation	

## 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

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



Execution: Who will do what by when?

GOAL	Sponsor a student to RYLA		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?	Resources needed				
	Get the goal approved by the board	Youth Services Chair (YSC)		Fee for RYLA, Youth Protection Policy	October 12, 2020	October 24, 2020	Ask president to be put on the agenda at the next board meeting	
	Put RYLA fee on the budget	YSC	Treasurer	Fee for RYLA	October 25, 2020	October 31, 2020		
	Ask for a volunteer to be the RYLA Chair (RC)	YSC	President (for approval)	NONE	November 1, 2020	November 15, 2020	Ask president or at club meeting for volunteer	
	Contact District RYLA chair for application information & RYLA schedule	RC	No one	NONE	November 15, 2020	November 30, 2020		
	Contact area high schools for applicants	RC	No one	List of all area High School counselors	December 1, 2020	January 31, 2021	Deadline to apply to interview: January 31, 2021	
	Recruit a committee to help interview applicants & take student to RYLA	RC	President (for suggestions)	RYLA schedule & interview schedule	February 1, 2021	February 15, 2021		
	Interview applicants & select	RC	RYLA Committee	Applications of all applicants	February 20, 2021	February 20, 2021	Choose that day	
	Educate student selected on the process for sign-up	RC	No one	RYLA application process & schedule	February 21, 2021	March 1, 2021		
	Keep in contact with RYLA student	RC	No one		March 2021	May 2021		
	Take student to RYLA & bring back home	RC or parent	Or RYLA committee member	Transportation	June 12, 2021	June 16, 2021	Youth Protections guidelines followed	
<b>OUTCOME</b>	Presentation by Student of the RYLA experience at a club meeting					<b>How will we know we've arrived?</b>		