

# 4. Visioning

## 4.1 Introduction

Visioning is a technique used to assist key stakeholders in an activity or organisation in developing a shared vision of the future. It can be used in:

- **Activity planning.** What will be the end result of the activity? How will the lives of poor people have been improved as a result of it?
- **Organisational change.** What kind of organisation do we want? How will it be structured? What will be its core values and ways of working? How will effectiveness be improved?
- **Formulating development strategy.** See Box 3, overleaf.

Visioning is a powerful technique, which, if used effectively, can result in a shared commitment to a future vision and an energised team focused on what needs to be done to achieve that vision.

## 4.2 What is Visioning?

Visioning is a technique that is used to assist a group of stakeholders in developing a shared vision of the future. It involves asking the group to assess where they are now and where they can realistically expect to be in the future (Box 1).

## 4.3 When to do Visioning?

In planning a new activity, Visioning is usually done after the Problem and Situation Analysis has been completed and before developing a logical framework for the activity (see Box 2). The results of the Problem and Situation Analysis help the group to define State A (Where are we now?). The results of the Visioning workshop describe

State B (Where do we want to be?), and can be used as an input to the logframe workshop. The vision provides a basis on which to develop the goal and purpose of the activity (see Box 3, overleaf).

### Box 1: Visioning for an urban poverty programme

#### State A: Where are we now?

Over 3 million poor people in Luanda, Angola, live in shanty towns with poor housing, limited access to drinking water, insanitary living conditions (owing to lack of sanitation, solid waste management problems) and suffer difficult road access in rainy season.

#### State B: here do we want to be?

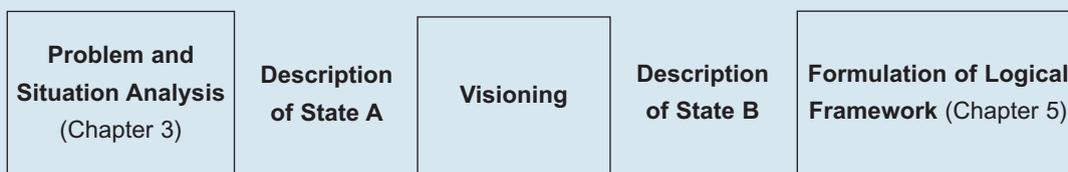
In 5 years, living conditions of 250,000 slum dwellers could be improved through the development and implementation of replicable, low-cost, community-managed systems for the provision and improvement of basic services.

In 10 years, living conditions of 1 million shanty town dwellers could be improved through provision of improved basic services.

At Implementation, Visioning can be used at any stage to help clarify where the activity is going (How will poverty be reduced as a result of the activity?) and to decide whether the activity design needs to be changed for the vision (the activity's purpose or goal) to be achieved.

Similarly in organisational change, Visioning is an essential step at the outset of the process (to gain a

### Box 2: Where Visioning fits in



shared vision of the kind of organisation the group wants to develop) and during Implementation (to check that the change process is on track).

## 4.4 Who should be involved?

All the key stakeholders in a development activity or organisation undergoing change should be represented in the Visioning workshop. Ideally, representatives of all stakeholders should come together in the same workshop, and arrangements made to allow full participation by each stakeholder. The workshop described in Box 4, for example, took place in three languages.

Sometimes, if a new activity is being developed in an area where the poor have not previously been involved in

### Box 3: Visioning a national development strategy

A DFID geographical department, together with other donors, was concerned that a country, just emerging from civil war, was unable to verbalise or prioritise its needs for assistance. The new, democratically elected government had few policies and was a coalition of interests; politicians were inexperienced in government and did not know how to teamwork with civil servants, producing antagonism and inertia.

A Diagnostic / Visioning workshop was mounted after careful consultation with the President and leading ministers composed of all ministers and deputy ministers, permanent secretaries and heads of departments, around 150 participants in all. The three-day workshop sometimes included parliamentarians as well. It was constantly televised and the media were on hand throughout.

The workshop followed the basic structure of the Visioning methodology and included group work on subjects identified in plenary sessions. A team of four facilitators from the UK and the region assisted them. A leading politician from a nearby country that had successfully embarked upon change supplemented the facilitators. Evening sessions were given over to unstructured discussions, often built around the viewing of episodes of *Yes, Minister*. This succeeded in creating a closer bond between politicians and senior civil servants. The workshop outcome was evident in the policy framework adopted by the Government from that time forward.

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development activity, it may be difficult for them to participate directly in a workshop. In this case 'champions', such as representatives from locally-based NGOs or social development consultants, should undertake participatory assessments with the poor, bring the results of that exercise to the workshop, and take the results of the workshop back to those same communities.

## 4.5 Facilitating Visioning workshops

Visioning workshops can be difficult to facilitate. Participants often require more support and encouragement than in other kinds of workshop. Because of this, one facilitator is generally needed for every 15 or so participants. If there is one professional or trained facilitator, it may be possible to find a second facilitator, with suitable skills and experience, from among the participants.

The key points for facilitators to keep in mind in organising Visioning workshops, include the following:

- Allow sufficient time. Four hours is the absolute minimum, and a full day is often needed.
- Start the workshop in the morning, so participants are fresh. This is especially important if the previous day has been spent in problem analysis.
- Recognise that some people are happier thinking at the level of day-to-day activities and may be sceptical of the value of Visioning. These people will need to be persuaded.
- Recognise that not everybody finds Visioning easy. Some participants will need support from colleagues and coaching by the facilitator, in order to make an effective contribution.

There are many different methods that can be used in Visioning. Two that have proved most useful are described in 4.6 and 4.7.

## 4.6 Visioning using pictures

This method is often used where participants speak different languages and/or many of the participants are illiterate. It can also be used in workshops with literate participants who all speak the same language, though the keywords approach (see 4.7) may be more effective for them.

Pictures can be very powerful ways of communicating, helping participants to show the relationships between different components and to visualise positive outcomes of an activity. Poetry, music or drama to aid the Visioning process can supplement the use of pictures.

The materials needed are large sheets of white paper and coloured flipchart pens.

### Stage 1: State the objective

Use the Stage A to Stage B model to explain the objective of the workshop, that is, to come to a shared and realistic vision of how the lives of poor people can be improved by a given point in the future (e.g., 5 or 10 years hence). Agree with participants what the end product will be: a picture summarising the vision, which will also be described in words and written down.

A briefing document for participants at a 1997 Visioning workshop on primary education in Ethiopia is shown in Box 5.

### Stage 2: Create working groups

Create mixed stakeholder groups of six or seven participants each. Ensure that the groups are gender-balanced. If it becomes clear that some stakeholders are not participating effectively in discussions (e.g., primary stakeholders, women, people who only speak a minority language) rearrange the groups to try to overcome the problem. If necessary set up single stakeholder groups and/or provide a higher level of coaching and support.

### Stage 3: Describe State A

Ask each group to describe State A (Where are we now?) using a picture, and to be ready to present the picture in a plenary session. If a prior problem analysis has been undertaken, ask participants to reflect on the results of that analysis. If not, use selected problem analysis techniques to help the groups think through the current state and its causes (see Chapter 3).

Encourage participants to reflect for a while on their own before starting group discussions. The facilitators should move among the groups, encouraging participation, creativity and imagination.

### Stage 4: Present State A

Ask each group to present its State A picture in a plenary session and to explain in detail what the picture is trying to convey. The facilitators should attempt to draw out the similarities and differences between pictures, and assist the workshop to reach a consensus description of the State A.

### Stage 5: Describe State B

Ask participants to continue working in the same groups and to describe State B (Where do we want to be?),

## Box 4: Links between Visioning and logical frameworks

It is not always necessary for all stakeholders to understand logical framework analysis (see Chapter 5). Indeed, logical frameworks can be scary to some people. In such situations, it can be useful to ask the same questions that are used in logframe analysis, but without presenting the findings in a 16-box matrix.

This was the approach used in the 1997 Ethiopia Basic Education Project stakeholder workshop. Here, there were 40 participants - parents, teachers, local, regional and national officials, and DFID advisers - speaking three different languages. Over a period of one week, the following questions were asked. Only at the end of the process was a logframe produced.

Question	Provides information on
Where are we now? What is the problem?	
What is our vision of the future?	<b>Goal</b>
Where would we like to get to in the next 5-10 years?	<b>Purpose</b>
What are the main things that need to be delivered by the project to achieve the vision?	<b>Outputs</b>
What needs to be done to deliver each of these?	<b>Activities</b>
How would you assess or measure that you are on track?	<b>Indicators</b>
Where would you get the information needed to make these assessments?	<b>Means of Verification</b>
What risks are there that the project might fail?	<b>Assumptions</b>

Once the workshop had reached consensus on each of these questions, one of the most articulate participants was shown how this information could be arranged into a logical framework; he presented the result to the other participants. A logframe was produced, but the most important thing was that participants gained a shared vision and reached a consensus on what the project would deliver.

Adapted from Tomas Kennedy and Steve Jones, *Ethiopia Basic Education Project Workshop Report*, 1997.

## Box 5: A workshop brief provided to participants

### Primary Education in Ethiopia: The Ideal Future

#### Stakeholder Workshop Visioning Process (Addis Ababa, November 1997)

##### Objective:

Imagine what the ideal future for primary education in Ethiopia would be...

In what ways would the lives of children, teachers and education officials be different from now?

At this stage don't think of how the ideal future could be achieved, concentrate on describing what it would look like.

### Small Group Work

#### Individual Preparation

- What would improving primary education achieve for Ethiopia?
- Make notes for your small group discussion.
- Draw a picture that shows, as best you can, what the ideal future for primary education in Ethiopia would look like if it were achieved.
- Discuss your picture, your thoughts and feelings with the rest of your group.

#### Small group discussion

- Each person shares their picture in turn with the rest of the group
- Listen carefully to each other. This is not the time for critical questions or analysis, but an opportunity to get a deeper understanding of how different individuals feel about the ideal future for the primary education sector.
- Ask any questions you may have for clarification.
- Draw a group picture that conveys as much of the group's ideas as possible.
- Post the group's picture on the wall of the workshop room.

#### The General Session

- Each group views all the pictures.
- A representative from each group should describe the picture to the other groups, who may also make comments about the ideas and feelings suggested by the picture.
- Are there themes, ideas or emotions that are common to each group?
- Record the characteristics of the ideal future on flipcharts and use this information as a lead-in to the logframe session.

For facilitators, it is a good idea to take photographs of the groups at work, and of the pictures that they create. If you use a digital camera the photographs can be inserted quite easily into a workshop report. Otherwise they can be scanned and then inserted.

Adapted from Tomas Kennedy and Steve Jones, *Ethiopia Basic Education Project Workshop Report*, 1997

## Box 6: Example of a vision statement

In five years, the Ethiopia Basic Education Project would result, in three regions of the country:

### Pupils

- All girls and boys of appropriate ages will be in school and achieve good levels of literacy and numeracy.
- More relevant curriculum taught in local language and including practical skills.
- Reduced drop-out, repeat and failure rates.

### Schools

- Equipped and furnished primary schools with sufficient classrooms, libraries and laboratories.

- Schools will have adequate toilets for teachers and children and water supplies.
- Increasing numbers of schools will have electricity and access to modern teaching aids (e.g., videos, computers).

### Teachers

- Teachers will be well trained, better paid, respected and professionally interested.

### Education officials

- Capacity to do their professional work will be enhanced, including their management skills.

### Parents

- Aware of the importance of education.
- Will co-operate in the management of schools.
- Will encourage their children to go to school.

again using a picture, and to be ready to present the picture in a plenary session. Encourage participants to imagine they have the authority and power needed to implement their preferred solutions to the problems identified in the State A description. An example could be: 'Imagine you are the Minister of Education and have the resources you need to bring about significant improvements in basic education. What could be achieved in 5 or 10 years?'

### **Stage 6: Present State B**

As with Stage 4, the facilitators should draw out the similarities and differences among the pictures presented. Now, the workshop should be assisted to reach a consensus on State B.

### **Stage 7: Turn the State B picture into words**

The facilitators should now assist the workshop in translating the picture into words. This can be done either in plenary session or using a small group comprising members from each of the working groups. Once drafted, the statement of the vision should be agreed in a plenary session.

Vision statements are usually up to one page in length, though there is no fixed rule for this. An example of a vision statement for the Ethiopia Basic Education Project is shown in Box 6.

## **4.7 Visioning using keywords**

This method is often useful where participants share the same language and are literate. The materials needed are flipcharts for working groups, coloured flipchart pens and Post-Its.

### **Stage 1: State the objectives of the workshop**

As 4.6 Stage 1, except that here, the end product will be a written statement of the group's vision of the future.

### **Stage 2: Create working groups**

As 4.6 stage 2, save that here, setting up single stakeholder groups will probably not be needed, although facilitators should still ensure that everyone has an opportunity to contribute, but not to over-contribute.

### **Stage 3: Describe State A**

Explain to each working group that the aim is to create a list of keywords describing the current situation, then to use the keywords to develop a brief description of State A. The list of keywords and the description will be

presented by a group member in a plenary feedback session.

If a prior problem analysis has been undertaken, ask participants to start by reflecting on the results of that analysis. If not, use appropriate problem analysis techniques to help the groups think through the current state and its causes (see Chapter 3). Encourage participants to reflect individually before starting group discussions. The facilitators should encourage full participation, creativity and imagination.

The facilitator should invite individuals to think, on their own, of five keywords that describe the current situation. The facilitator should then go round the members of each group in turn to supply one word, not previously said, to be written on a Post-It or card and placed on the flipchart or an area of wall. Once all the words have been recorded, the group should be asked to suggest how the keywords could be grouped to describe different dimensions of the current situation. These groupings of keywords can then be used as a basis for a brief description, in a few sentences, of State A.

The different descriptions of State A are then presented in a plenary session.

One of the facilitators highlights the similarities and differences between the descriptions, and assists the workshop to reach a consensus on State A.

### **Stage 4: Describe State B**

Ask participants to continue working in the same groups and describe State B, using keywords to arrive at a brief description, and to be ready to present this in a plenary session. As in 4.6 Stage 4, facilitators should encourage participants to imagine they have the authority and power needed to implement their preferred solutions to the problems identified in the description of State A.

Each group is then asked to give a detailed presentation of its vision (State B) in a plenary session. One of the facilitators should attempt to draw out the similarities and differences among the presentations, and assist the workshop to reach a consensus on the vision of the future.

## **4.8 Organisational Visioning**

The principal circumstances in which staff working to create development interventions will come into contact with Visioning, will be as shown in 4.6 and 4.7. Where the objective is to assist a group of stakeholders to envision

where they wish to get to, Visioning at an organisational level can be both more complex and more challenging.

Often, the most difficult thing for any collection of people to do is to imagine what the future of their organisation should look like. Here, it will be the facilitator's task to assist the participants through this Visioning.

Where an organisation is seeking in a workshop environment to review what its role should be, Visioning can be important to the overall success of the workshop process, by divorcing participants from the problems of the present. Visioning allows participants to visualise not only the future role and functions of the organisation but its purpose, its values and its style of operation. Participating in the process can help commit participants to that vision and can provide a base for obtaining subsequent commitment in the wider organisation. For instance, it is often used in change processes for police services in the form of a Statement of Common Purpose and Values, a 'mission' or 'vision statement' found on a plastic card in every police officer's pocket. The Visioning process, therefore, lies at the heart of organisational future planning and the change process necessary to bring it about.

Visioning is not a one-time activity, and self-limitations by participants – such as 'I couldn't possibly suggest that' – may harm the outcomes. The facilitator must not be afraid of having repeated attempts, using different Visioning techniques, to create a common vision, if the initial results are unsatisfactory.

A keyword approach to undertaking an organisational Visioning workshop is shown in Box 7.

## 4.9 Guided visualisation

Whether used in creating a development activity, or change within an organisation, Visioning has one common feature: its participants should operate as equals, with the facilitator seeking to ensure that all are given an equal voice in the process of determining the future.

At one level this reflects DFID's own promotion of the role of 'partnership' in development, where different partners bring different skills and resources to an activity, but for a common aim. While the doctor-patient approach to development assistance – 'this will be good for you' – may have been consigned to history, many organisations operate on a basis of inherited vision – sometimes cloaked in spurious historicity as 'the founder's vision'.

### Box 7: Organisational Visioning: 'Where do we want to get to?'

There have been many techniques developed to assist workshops to think through their vision of the future organisation. The most common and simple is to use keywords.

Having told workshop participants they are now going to visualise their organisation in the future, the facilitator can ask them to shout out single words that describe some aspect of their future organisation's operations.

The experienced facilitator may introduce some drama by asking them to close their eyes to visualise the organisation. The facilitator may also direct the participants thoughts in various ways given the words s/he uses to describe the task. Phrases such as 'give me a word that describes the feel of the organisation' is more likely to result in words describing values and style whereas 'give me a word that describes what the organisation does' will result in purposes, functions and roles.

The facilitator writes up all the words on a flipchart, adding the name of the person who suggested it. When new words have been exhausted, the facilitator asks the

participants to concentrate on the words as a way of getting them back together as a group. Some words will overlap or describe roughly the same thing, but it is not the facilitator's task to recognise this.

The facilitator then asks the person who suggested each word to write a sentence about what the word means. Those participants who did not suggest a word can help the individual 'keyword champions'. The results are then fed back in plenary.

It is possible to continue to produce a mission or vision statement on the flipchart in plenary, but this is often disruptive to the flow of the workshop. It is therefore best left to a group to undertake following the workshop, or a statement can be drafted by the facilitator during a break and fed back to participants later in the workshop. If the latter technique is used, it is useful to underline those participants' words that have been used in the statement.

The resulting mission or vision statement will often have a concise, catchy beginning and then a list of functions and/or values attached to it. For example, 'This organisation [the Ministry of X] exists to...' '...It does so by / through...'

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Here, the salient feature is that the vision was handed down from the top. 'Co-creating' a vision is different: it results not in an imposed vision, but a shared one.

A 'shared vision' is a collective awareness of what is important for the future, and, by being more likely to link past, present and future, can be a more holistic view of the organisation than an imposed vision.

Creating a shared vision, however, may need assistance, since, as management consultant Peter Senge describes (see Annex 3), there are several different ways in which a vision can be created, and only one of them involves co-creation:

- **Telling.** 'We've got to do this. It's our vision. Be excited about this, or reconsider your vision of your future with us.'
- **Selling.** 'We have the best answer. Let's see if we can get you to buy in.'
- **Testing.** 'What excites you about this vision? What doesn't?'
- **Consulting.** 'What vision do members recommend that we adopt?'
- **Co-creating.** 'Let's create the future we individually and collectively want.'

Guided visualisation is about drawing pictures in people's minds, and allowing them to act as co-creators, filling in the details of the general landscape that has been pictured. Box 8 shows how it can be used with large groups to focus on specific initiatives or areas of work.

### Box 8: Creating a shared vision through guided visualisation

In Zambia, several hundred stakeholders were brought together to develop and implement a national HIV/AIDS programme and district action plans. Reading a short story about a better future, the facilitators guided the group through a half-day process to create a shared vision. Although the visualisation below relates to HIV/AIDS, it can easily be modified to suit your own purposes.

Ask participants to make themselves comfortable. Read the story slowly, with frequent pauses to allow the participants to visualise what is being depicted.

'Imagine yourself three years from now in the future.

'You have been away from Zambia since 2001 and are now just returning. On your flight, you recall receiving a letter from a former colleague.

'Your colleague invited you to visit her and see the many changes in HIV/AIDS programmes while you were away.

'She said that there have been many changes resulting from strengthened co-operation and collaboration among organisations, and between the district health teams, non-governmental organisations and donors.

'After your plane lands, you will be able to see the changes.

'As you and your colleague drive through the district, meeting people working on HIV/AIDS issues, you are pleased with the changes you see. Some changes are great, some small.

'Now describe what you have seen. What has changed for the better? Be as specific as possible.'

Source: Social Impact