

*[Envisioning is a tool that can be used to determine the Mission and Vision of an organisation, but can also be applied at a much smaller scale to brainstorm and decide on an activity. It helps to come to creative and innovative solutions, and can therefore be of great value in many workshops and meetings that seek solutions beyond the known and obvious. It is therefore valuable not only at the formulation, but also at all other stages of the project cycle. This is why we placed it in the middle of the cycle PowerPoint sheet. It is closely linked to developing Strategic Options and the stage of translating Results into Activities in a Logical Framework].*

## Envisioning

### What is it?

Envisioning is an inter-active tool to guide the visionary thinking of stakeholders of an organisation, or of actors with an interest in a certain subject. Envisioning is a way to prevent that reflection on the current problems hampers the discussion about the future. It helps to arrive at a common vision, mission, identity, values and profile, to identify problems that may jeopardise reaching the envisioned, and to prepare policy choices to prevent (or address) these problems. It helps to reassess whether we do *the right things* (in view of long-term trends and objectives), rather than that it limits the discussion to the operational question whether we do things *the right way*. Moreover, the activity of envisioning as well as the vision itself helps to inspire, bind, direct and challenge the stakeholders.

Starting from the need identification of the target group, the key-actors involved are identified. In addition the roles of the key-actor(s) are identified, and the products and services to achieve the required output. In addition the enabling conditions and inputs could be identified.

### What can you do with it?

#### Basic (sub-) question

- What should be the long-term mission of the organisation or stakeholders (project), and what should they produce/do to contribute to achieving it?
- What should the organisation or project do in the immediate future to move closer to shape new initiatives, in response to new opportunities? (In stead of realising the entire dream it may help to realise some steps in order to improve the actual performance of the organisation)

#### Results

- How would you like the sector/organisation to address the felt needs of its target population in five or ten years?
- An image of how the organisation could function to address the felt needs of its target population?

The process of envisioning on the organisation produces a vision towards the role and function the organisation that it wants to fulfil in the future: what output it should deliver,

what enabling conditions or inputs are required, and how to arrive at meeting these conditions.

The process of envisioning on a sector produces a shared vision of stakeholders in this sector towards the felt needs of the target population, and the services that various suppliers should deliver.

## **How to use it?**

### **Process**

Envisioning may be done with a group of 5-25 people and take 2 hours to one day. It is essential that the facilitator ‘decontaminates’ the three processes of dreaming, realism (action planning to realise dreams), and criticism (checking whether plans are safe and sound). Preventing contamination implies that during brainstorming (about both objectives and action plans) people do not yet comment on feasibility, because this stifles creative (right brain) thinking.

The participants of envisioning need to know or represent the target group from different angles, as well as the staff members of one organisation from different layers or different organisations. Envisioning can give a broad view on strategic options that might (without envisioning) might become too narrow and limited to what is already familiar.

### **Groundwork**

A target group needs (problems and objectives) assessment and external organisation analysis should be conducted prior to (or included in the envisioning). Envisioning can be done at the start of a process, before the formulation of strategic options (that respond to the findings of institutional analysis), but can also be done outside of the strategic orientation context. Envisioning may proceed after formulating a Basic Question for the development of the organisation, but need not be part of a larger organisational development exercise.

### **Follow-up**

If envisioning is done to position a new programme or organisation, the next step is action and operational planning. However, if envisioning is done early in a strategic orientation process, the strategic choices should still be left open until options are matched with organisational strengths and weaknesses (followed by action and operational planning). Operational planning may include assessment of support and resistance to change, and measures to manage the change implementation.

### **Requirements and limitations**

A facilitator should guide the process from envisioning up to the strategic planning to ensure that all original ideas find their place in the process – it is essential that all stakeholders can see that their contributions are incorporated (or openly rejected).

The “envisioning” steps need an open mind of the participants. It is much fun, unless some participants treat the exercise or input of others as childish. The reality check may be done on consensus or otherwise by voting. The dreaming steps can be done by representatives of the stakeholders only, while during the reality check the actual

executing agent (management of the organisation, co-ordinators of the planned programme) should also be represented, to assist in identifying the scope of work and the related budget.

### **Practical references**

- MDF syllabus “Vision Development”, 2004
- Interactieve beleidsvorming, Beukblad nr 1, maart 1998, De Beuk, Hippolytushoef
- Edelenbos, J en Monnikhof R. (1998) Spanning en interactie, een analyse van interactief beleid in locale democratie. IPP.
- Internet search for ‘Walt-Disney strategy’, as Walt Disney applied the strict separation of dreaming, realism and criticism to develop film scripts.

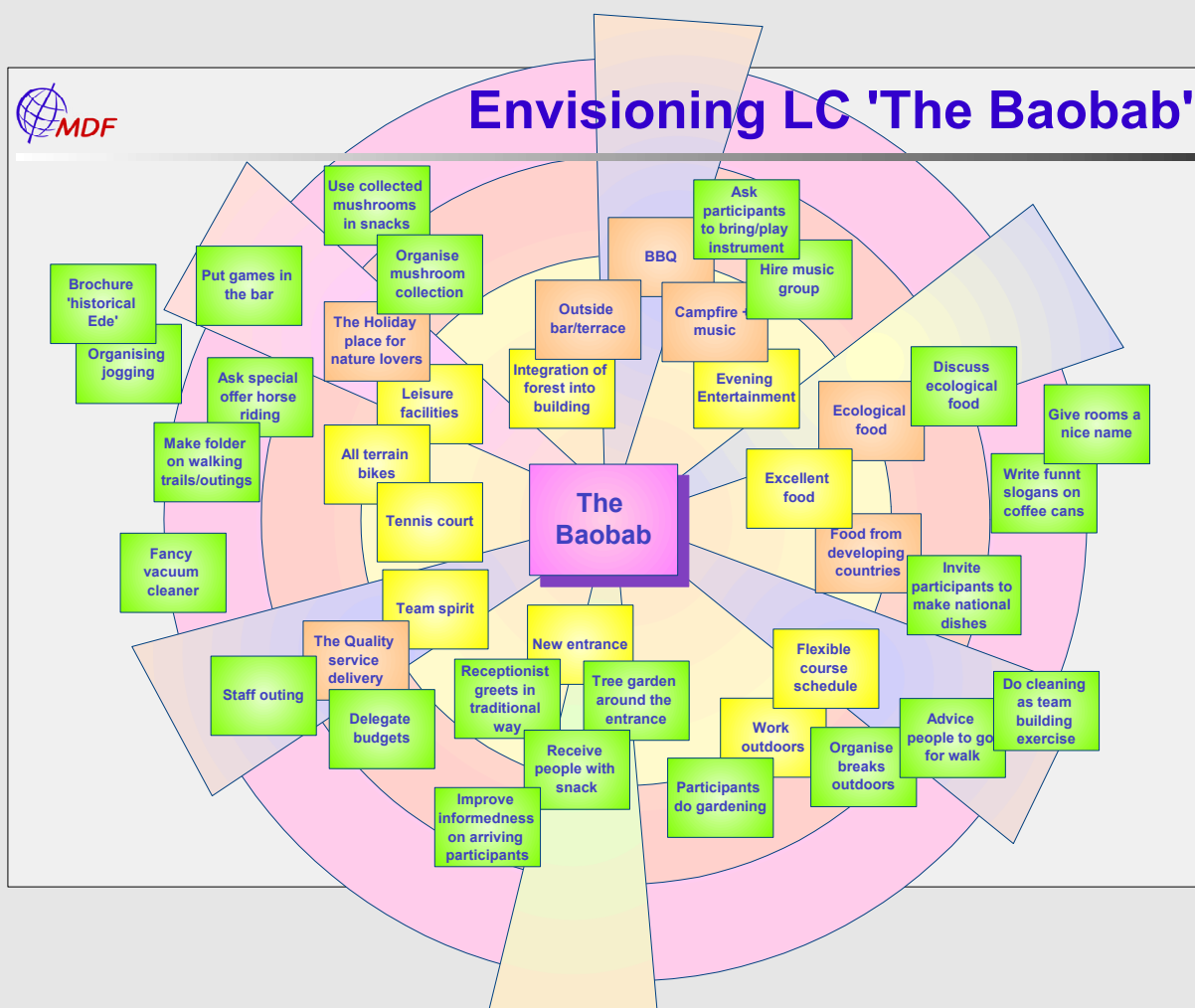
## Example of Envisioning: The Baobab

### Problem owner

Learning Centre (LC) 'The Baobab'

### Basic-questions

What would the LC 'The Baobab' look like five to ten years from now, and what should it undertake now as practical steps in that direction?



### The Process

In a first round (yellow cards), the participants were asked to dream on the improvement of the Baobab. The cards were displayed and in a next round (green cards) the participants were again asked to dream away on the same question, with the first round of ideas in mind.

### Conclusion

Seven out of the many suggested activities (orange cards) were taken up. Others are kept for inspiration and reflection in the future.

## Example of Envisioning: INGO

### Problem owner

Dutch INGO

### Sub-questions

- What should be the situation of the target group (**overall objectives** of interventions) five years from now (white)?
- **Which organisations** should help realise the objectives of that situation (yellow)?
- What should be the **role, products and services** the INGO delivers (green)?
- Which **results** should the INGO achieve to contribute to the objectives (grey)?
- Which **activities** should the INGO undertake to realise the results (white)?

## Steps to envision

1. **Define the entity** (subject, area, how many years ahead we will dream – normally five to ten years) and check understanding and agreement on the entity with the participants. Write the agreed entity in the middle of a white board or poster.
2. **Introduce the dream.** As facilitator ask people to relax and (speaking slowly) describes in colourful terms that in five to ten years from now the programme or organisation receives a price of excellence. Let the participants imagine what the speaker, who awards the price, says to explain why the project or organisation deserves the price. The speaker talks about (choose one of the two):
  - The characteristics of the excellent situation of the target group, or
  - The characteristics of the project or organisation that make it outstanding and successful in achieving its aims
3. **Dream individually.** Let the participants dream for five to ten minutes about the situation of the target group/clients or on the characteristics that produced the success of the project or organisation. Participants write their dreams in key words on yellow cards (one dream per card).
 

*To encourage that people dream beyond 'more of the same', you may specify that everything is allowed, except for dreams that are already pursued at present. You may also require participants to contribute no less than three dreams.*
4. **Cluster and add:**
  - Collect and put the characteristics as sunrays around the entity, meanwhile clustering similar cards (check with participants whether subjects are truly similar)
  - Let participants in reaction put more ideas on orange cards (observing the characteristics identified by others may inspire further ideas)
5. **Realise dreams:** Once you have a rich collection of dreams, ask people what they could do towards the dream – let them write it on green cards which you put next to the dreams. Go cluster by cluster. Two options:
  - Develop an action plan: Let people write ideas of *actions* they could do *tomorrow* (or the very near future) as a first step towards the dreams
  - Develop an organisation mission or project overall objective: Let people write *products and services* needed to completely realise the dreams
6. **Criticise dreams** – or reality check. Once you have a collection of characteristics as well as practical plans, analyse which ones to adopt. Criteria can be cost-effectiveness, risk, any other criteria from your Basic Question (if you work with a BQ), or factors that affect the realisation of the dream
7. **Prioritise and choose** objectives and/or actions through voting. Give each participant a number of votes with the instruction to give ideas minimum 0 and maximum 3 votes:
  - If you develop an action plan: Give people 10 votes for possible short-term actions. Adopt the 10 most popular actions in the action plan
  - If you develop a mission or project objective: Give each person around 5 votes for characteristics of the project or organisation. Adopt the most popular 5 to form the overall objective or constitute the organisation mission