

Tools for Visioning

In Visioning Basics, we pointed out that it is not often difficult to get people to dream about their futures (if they trust the process will lead somewhere).

Visioning taps human creativity and brings people together in an engaging and stimulating way. Since there is no such thing as a wrong dream, participants can let their imaginations have free reign and encounter one another on a level playing field, where everyone's dream is valid.

Yet, there are some people who do have difficulty "letting down their hair" for exercises such as these and, so, the facilitator needs to respect these individual differences. The exercises below range from straightforward to "new age", if you will, so one must consider the nature of the audience before moving too quickly.

There's a good story, probably apocryphal, that can be used to pry the unwilling into participation:

"In the town I come from there was a program to bring a resident poet into the school system. On the first day, the poet found herself in front of a gym-full of 1st graders and she asked how many in the room were poets. Every single hand shot up. Later in the day, in front of a class full of sophomores, she repeated the question. No hands were raised."

"What is it about our educational system that drives creativity out of our bones?"

You can use this parable to make the point that everyone has an innate ability to dream. Heavens, even dogs do it, don't they? The only requirement is that we check our pessimism at the door and give it a try.

Using Collages to tap our Dreams

Summary: This is a technique that works well with a small group, 10 or fewer. It is very inexpensive. While some may be a little embarrassed to show their collages, it does distract attention from the speaker to the artwork. It provides a quick overview of a range of values and beliefs that, if codified on newsprint, can then become grist for further discussion in the context of a focus group. It does not require a paid facilitator. One of the tools discussed below - Collages and strategic planning - dovetails with the Policy Governance model © of John Carver.

The technique requires advance notice and instruction to the participants, who bring their collages to the meeting or focus group. The collection later provides a nice visual exhibit that can be posted in a public space as a way of engaging a wider audience.

Collages and Focus Groups

Summary: Collages were used as stimulus material for the original series of focus groups that led to the development of the AdvantAge Initiative project. Designed by Cogent Research of Boston, this focus group study gathered a small, random sampling of older adults and selected community leaders in four diverse U.S. communities.

When telephoned participants stated their approval to participate in focus groups, they were invited to create and bring a collage to the meeting. A collage was defined simply as a kind of small poster made up of clippings, magazine

pictures, and any other hand-made pictures or words that would define “ a good place in which to grow older.” Calls were placed approximately 14 days prior to the focus groups.

Almost without exception, focus group participants, all of whom were anonymous to one another, arrived at the sessions with prepared collages. Clearly, the amount of time and effort that went into the collages varied dramatically, as one might guess. Nevertheless, plenty of material for discussion emerged as participants, in round robin fashion, shared their ideas by pointing to the relevant images on their collages.

In focus groups, such collages provide a relatively non-threatening and fun way to break the ice and introduce a discussion topic. The time spent in demonstration should be kept short to move things along to the more important work. In reviewing the initial exercise, the moderator can make several relevant points:

- Despite the oft-discussed denial of aging, most everyone has an image of their later years, whether private or not.
- The images that people hold are quite diverse - as they age, people become more different, not more similar. The moderator can certainly point to the range of opinions in a dramatic way.
- Perhaps the lesson learned is that a “good place in which to grow old” should accommodate all of these dreams.
- ...segue into your focus group script here.

In another section, more attention is devoted to the general technique of focus groups.

Collages and Strategic Planning

Summary: In the spring of 2004, Evergreen Institute consultants provided support to the Board of Directors of LifeStream Services, Inc., the Area Agency on Aging serving east central Indiana. In a series of three board workshops, participants moved from a visioning process to a prioritized set of ENDS policies that would define the direction of the agency in the coming year(s).

With permission, the detailed guide to this process is linked so that prospective facilitators and planners may use the guide for their own purposes.

This particular agency rigorously employs the Policy Governance model © across a wide range of activities. The visioning and planning process was therefore designed to correspond with this approach. For more information about the Carver Policy Governance model, go here: <http://www.carvergovernance.com/>. To contact

LifeStream Services, Inc., President and CEO William H. Boothe, go here:

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Guided Imagery

Summary: Guided imagery is a low cost method that a single facilitator can use with small to large groups. The exercise can be completed in as few as five-ten minutes, though it is always followed by discussion and interpretation. The process invites listeners to relax, close their eyes, and travel through the mind's eye with a "guide" for a brief period of time. In Evergreen Institute training events, participants travel through what they might imagine to be an "elder-friendly community." It

requires a quiet room and a willing audience. While a paid facilitator is not required, a group leader with experience is helpful. The guided imagery "script" should be written down beforehand so that it can be practiced and read to the group.

While typically thought of as a therapeutic tool, useful in promoting relaxation, healing and stress reduction, guided imagery has found wide use as a visioning tool for strategic planning.

Briefly, guided imagery takes participants through a "mental map" of unrealized dreams. Participants temporarily disengage from the outside world and attempt to visualize a new community through the mind's eye. The script provides key questions along the way as participants silently imagine this new terrain.

By way of introduction, the facilitator should describe what the exercise will involve. Participants should be invited to move their chairs apart, place both feet on the floor, hands resting comfortably on laps. "Let your head bobble for a few seconds then find a comfortable resting position on your shoulders. Now close your eyes and begin to enter into your own zone of peace and quiet..."

In the following script, authored by Evergreen associate Jane Clay, participants gather for a bus tour of their community of the future.

Visioning an Elder-Friendly Community

Guided Imagery

Jane Clay, Evergreen Institute on Elder Environments

Visions of our preferred future are the pictures we carry in our minds and hearts of how we want something to be when we have gotten it right. Our visions inspire us to work toward the ideal. So now, we are going to picture a preferred future in which people are valued and their needs are met throughout their lifespan. Then we'll share the dreams so we can get to work on making it happen.

Please settle comfortably in your chair. Leave pencils and papers on the table, hands in your lap. Now close your eyes...relax...listen...and imagine what our community will look like when we get it right.

(Start Music – “Quiet City” by Aaron Copland)

It is the future – the year 2010. A very special tour arrives in our community. Filling the bus are leaders from across the state, the country, and the world. They are here to see our community, the best community for people of all ages in which to grow up, live and work, and grow old.

The bus pulls up to the curb and stops so someone can get on. This someone is the tour guide who will be showing the guests around. The tour guide is ...YOU! And why not you? You are responsible for the progress this community has made. You were an integral member of the team that pulled everyone together, dreamed big dreams that got people excited and eager to use their gifts and talents to build a community that's a good place to live and grow old. Now these leaders, from all over, have asked you to show them what your community is like and how it was done. You're happy to be pointing out all the ways your community provides a good quality of life for everyone, young and old. And at each stop you explain how your group has influenced the community's progress in this area.

You see people of all ages. They are:

Going to work...Where do they work? What kind of work do they do? How do they get there? What are these workplaces like? How do people work together on the job? How are young and old working together to make the work they do more effective?

(How did your group improve workplaces for all in your community?)

Children going to school...What do the schools look like? What activities are going on? What are the children learning? Who are they learning from? How are the students, teachers, parents, neighbors and administrators interacting? How is the role of educating youth viewed by those who are not parents?
(How did your group improve schools in your community?)

Seniors...Where do they live? What are they doing? How are they getting around and finding services? With whom are they interacting? What quality of life do they enjoy? How are they viewed by the rest of the community?
(How did your group improve life for elders in your community?)

Teenagers...What are they busy doing? How are they spending their time and energy? What do they value about their community? For what are they valued by the community? How do they interact with those older and younger than they are?
(How did your group touch the lives of teenagers in your community?)

People in neighborhoods...What do the neighborhoods look like? The streets? The houses? How do people feel about their neighborhoods? Do they feel safe? Are they proud to live there? What are the people doing together?
(How did your group improve the neighborhoods in your community?)

People are going places to enjoy leisure time...Where are they going? What are they doing? How do they interact with others? What kinds of opportunities for leisure do they have? In the arts? Recreation? Outdoors? In all seasons? How are people getting there?
(How did your group impact the opportunities for leisure enjoyment in your community?)

People are volunteering...helping each other. Why are they doing this? What are they doing for each other and with each other? Who are the recipients of these efforts?
(How did your group improve the ways people help each other in your community?)

Important decisions are being made in your community...What are the decisions being made about? Who's involved in the decisions? What processes are being used? Do people like the results, process, and the way they are treated?
(How did your group improve the way community decisions are made?)

People are worshipping...What impact does faith have on the life of the community? How have differences between faiths been resolved?
(How did your group impact the role of faith in your community?)

The people you see are, as always, a mix of races, philosophies, ages and perspectives. How do different people and groups of people show they appreciate, understand, and value others?
(How did your group help your community identify and appreciate its diversity and deal with problems in this area?)

People are coming and going at civic meeting centers around town...city hall, the courthouse, libraries, arts center...What's going on there? Who's participating?
(How did your group improve opportunities for participation?)

People are going to places of health care...What is their state of health? What do they do to promote their health and wellness? Where is health care provided? Who receives health care? How are health decisions being made?
(How did your group solve problems about health care for all and promote the well-being of the whole community?)

What is the status of the environment? Who speaks for the environment? How have the decisions made about the environment affected the quality of life in the community?
(How did your group impact the decisions made about the environment?)

The tour's almost over...You've covered it all...or nearly all. As the bus heads back to your departure place, you swing by one more spot. You don't want the visitors to miss this...it's the part of the community of which you're most proud...What do you show them and what do you tell them?

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Now the tour is over. It's time for you to leave the bus. Before getting off, you walk down the aisle for personal good-byes. One by one the visitors thank you. One by one, they tell you how they liked what they saw.
"Congratulations, they say. You got it right! This is what we want, too. We want communities that work just as well for all members as yours does!"

-END-

When participants are brought back to "reality", the fruits of this exercise are harvested through group discussion and de-briefing. Participants may wish to take a brief break at this point, but they are reminded to keep the images from the tour in their minds, in preparation for sharing them with others.

Depending upon your goals and the size of the group, the following exercises can be done with the participants:

Host an overall discussion with the entire group, asking people to share key elements of their dreams - things they saw that made them feel good about the community. (10-15 minutes)

- Then ask participants whether they feel optimistic that some of these elements and dreams can be realized in this community
- What are the barriers?
- What would it take to change?
- How would you create this future?

Or, break a larger group into small groups of 5-8 (at tables) to conduct a poster project. (30-45 minutes plus 15-45 minutes for "reporting out.")

Distribute one sheet of newsprint and multiple colored markers to each table.

Ask the group to spend the first ten minutes sharing the things they saw on tour.

Make sure each table selects a recorder to take notes from this discussion, listing key words they hear as people share their "maps".

After ten minutes, ask each group to now plan and execute a drawing or map that describes what they feel would be a “good place to grow old.” Explain that they will have to determine what scale is important first of all: Will they try to draw an entire city or town? A neighborhood? A single facility? Anything is acceptable, of course, since we seek principles that can be applied in any environment, small to large.

Monitor the groups to make sure they don’t linger too long in planning. Some groups will forge right ahead, others will choose to carefully plan and only draw towards the end.

After 20-30 minutes, the groups should be near completion. A short break is sometimes desired here.

In round robin fashion, allow two people from each group to stand and display their maps for the entire audience. The speakers should narrate what the maps say or mean and answer questions that audience members may pose. (five minutes per group).

Following this exhibition period, the facilitator will then lead an overall discussion to summarize key points, things learned through the exercise. Using newsprint to record these points, for later use of course, the facilitator might say:

“Ok, let’s list the key elements of a lifespan (or elder-friendly, or kid-friendly, etc.) community -

some examples:

- old people are everywhere (see C. Alexander, *A Pattern Language*)
- universal accessibility
- people can get to stores, services, cultural and rec. facilities
- old people are respected in interactions with others
- kids and old people interact frequently
- people can die at home or in their residence of choice
- the environment promotes physical exercise
- locally grown and healthy foods are eaten

These key elements, retained for later use, can provide an excellent starting point for subsequent strategic planning efforts. If the workshops continue throughout the day or are set up as a series, the facilitator can help participants explore these ideas further, according to interests and energies of the group.

- This can be a link to a discussion of surveying the community to see whether these principles are, in fact, being followed.
- If the project is linked to the AdvantAge Initiative survey process, it can provide a basis for identifying key issues around which particular survey questions can be utilized.
- Small task groups can begin take similar issues and explore them in greater depth to identify key stakeholders, barriers, helping forces, and potential action steps - reporting back to the large group at a designated point in time.
- The posters can be matted and displayed in a public venue that may serve to continue and expand the community dialogue.