



C.O.O.L.-Idealist Civic Engagement Curriculum

Creating a Shared Vision

Overview: This workshop provides a useful framework for a team to consider and develop a coherent, shared set of conceptualizations, goals, and values for a given project or work. By providing an opportunity for each team member to articulate and shape hopes and expectations for a project, the group can develop a shared vision which helps create a culture that values the full and effective participation of all of its members, regardless of personal identity, experience, or background.

This workshop, drawn from *The Fifth Discipline Fieldbook* (Jossey Bass, 1994) fits well with a session on creating one's own, personal vision – a good resource for this individual visioning exercise is *Creating a Personal Vision*, also in the C.O.O.L.-Idealist Civic Engagement Curriculum. *Creating Shared Vision* alone is NOT enough to develop shared vision within a group, but it can provide a great starting point. The ideas articulated during this exercise can ideally be used to form the basis of a group's mission statement, set of goals, guideposts, and team values. It can also be used in conjunction with a variety of other C.O.O.L.-Idealist Civic Engagement Curriculum workshops, such as *Cover Story*, *Creating an Asset Inventory*, *Goal-Setting with BHAGs*, *Power Mapping*, and/or *Setting Objectives*.

Category: Reflection, interpersonal skills, diversity, visioning, project planning

Level: Advanced; requires an experienced facilitator who is knowledgeable about facilitating group processes; suitable for students who are in a leadership or management role, or for a student leader/administrator in order to get newer students to participate and feel comfortable with the mission/goals of the group

Type: Structured activity suitable for a lengthy workshop (e.g. retreat or training lasting at least 3 hours)

Focus or Goals of this Guide:

- Provide a team with an opportunity to formally consider and integrate their own ideas and visions for a given project, organization, or work.
- Give each person the opportunity to articulate ideas, images, or feelings about what they consider the “success” of their work.

Materials:

- Handout or flip chart of Visioning Questions (found at the end of this guide)
- Paper/notebook for writing

How to Prepare:

Review the trainer guide and become comfortable with all information and activities. Determine a process that you will use for facilitating the proposed activities. If you need to, consult other guides or resources for facilitation techniques. Set aside the proper time and space. Prepare any materials that you will need.

How to Do/Brief Outline:

Total suggested time for this session is between 3 ½ to 8 hours (modify as needed):

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| 1. Vision for the Future | suggested time 2-4 hours |
| 2. Getting There From Here | suggested time 1-3 hours |
| 3. What Will We Do Next? | suggested time 30 minutes to 1 hour |

1 Vision for the Future: Shared Brainstorming

Suggested time 2-4 hours

Formulating an “Imagine Statement” (sample Imagine Statements are included below) and an accompanying set of questions is the primary purpose of this exercise. Modify the statement and the questions according to your project and timeline.

When facilitating the exercise, try to remain focused on the primary objective of formulating an Imagine Statement and spend time only with the questions that are meaningful for your team. Alter the questions as you like. Your role should be that of an objective facilitator whose goal is to help the group get out their best thinking and work with those ideas. If you need assistance in understanding how to facilitate, see the other trainings (such as *Facilitation 101*).

You should set aside ample time for this first part, either in one setting such as a retreat or long session, or over multiple sessions.

Sample Imagine Statements:

1. *General:* It is _____ (you choose the time frame) from today’s date and you have, outrageously enough, created the project and program you most wanted to create and achieved the things you most desired. Now it is your job, as a team, to describe this work as if you are able to see it, realistically, around you at this present moment.
2. *Service/Project Team:* It is graduation and you have, marvelously enough, created the service project and team experience you most wanted to create and achieved the things you most desired. Now it is your job, as a team, to describe this work as if you are able to see it, realistically, around you at this present moment.

3. *Staff/Sustainability Related:* It is five years from today's date and you have, marvelously enough, created the program/organization you most wanted to create and achieved the things you most desired. Now it is your job, as a team, to describe this work as if you are able to see it, realistically, around you at this present moment.

Note to Facilitators: Ask people at this point to begin to jot down ideas. Then introduce the following questions. Consider using a flip chart that everyone can see and visualize.

- Who is affected by our work and who affects the direction of our work? Who are our leaders and collaborators? How do we work with the people we affect and are affected by?
- What is our image of success in our own minds? Backyards? In our city? In our country? In our world?
- What is our organization's role in our communities? Who are our communities?
- What is our unique contribution to the world around us? In the short-term? In the long-term?
- How do we handle good times? How do we handle stress or hard times?
- In what ways is our workplace (campus or organization) a great place to work?
- How do people treat each other? How are people recognized?
- What are our values? What must we retain? What must we not change? What can/should be changed?
- What have we done to ensure or make better each members' (of our group or community) future? How about the future of our children or grandchildren?
- What goals and objectives can we set to move us toward fulfilling this imagined vision?

You can consider these questions one-by-one or determine some other process. You may want to allow people to work alone and quietly on each question or a set of questions, then reconvene and take ideas from the group members to discuss and synthesize.

You should make sure everyone has an opportunity to comment on each of the questions. Your main purpose is to create a safe, participatory atmosphere where each team member has the opportunity to contribute to shaping a common vision.

2 Getting There From Here: Assessing Where We Are

Suggested time 1-3 hours

The second part of the activity requires engaging people in an honest discussion of where the group/project/team/etc. is right now in relation to the shared vision that they have begun to articulate. Below are a number of suggested questions to spark discussion. Again, as facilitator you need to ensure that all participants involve themselves and that a comfortable environment is established in which everyone feels safe sharing their thoughts and ideas. Sample questions:

1. What is our group's role in creating this vision? What is our role in the context that we work (e.g. our start-up, our organization, our community)?
2. What forces are currently affecting our work and our team, inside and outside? What changes are we going through as a team? As an idea? As an organization?
3. Who or what influences what we value?
4. What aspects of our team's mode of operation empower people? What aspects of our team's mode of operation disempower people?
5. What do we know (that we need to know)? What don't we know (that we need to know)? What don't we know, period?

Note to facilitators: Provide people with the opportunity to tackle questions and share responses. Use skillful facilitation to pull out common themes and elements. If you want, synthesize elements of the discussion, possibly by turning the group's attention toward agreeing on a simple statement that captures their visions and purposes.

3 What Will We Do Next?

Suggested time 30 minutes-1 hour

Finally, you want to synthesize all your work thus far and move forward. You may do that by having the group work on and agree to a vision or mission statement of some kind that represents the points that are most salient to them.

Then, you can use the most relevant contributions and suggestions to create a set of practical goals and actions. How can these goals be integrated into the group's daily activities? Set a meeting date to evaluate the goals and integration into the group's functioning.

With the group, agree to a few (one to three) concrete next steps for action and write them down.

Integrate the goals you've devised for your group into your daily activities. Utilize program calendars, expectations, meeting plans, etc.

Visioning Questions

1. Who is affected by our work and who affects the direction of our work? Who are our leaders and collaborators? How do we work with the people we affect and are affected by?
2. What is our image in our own minds? Backyards? In our city? In our country? In our world?
3. What is our organization's role in our communities? Who are our communities?
4. What is our unique contribution to the world around us? In the short-term? In the long-term?
5. How do we handle good times? How do we handle stress or hard times?
6. In what ways is our workplace (campus or organization) a great place to work?
7. What are our values? How do people treat each other? How are people recognized?
8. What have we done to ensure or make better each members' (of our group or community) future? How about the future of our children or grandchildren?
9. What goals and objectives can we set to move us toward fulfilling this vision?

Getting to That Vision: Assessing Where We Are Right Now

1. What is our groups' role in creating this vision? What is our role in the context that we work (e.g. our start-up, our organization, our community)?

2. What forces are currently affecting our work and our team, inside and outside? What changes are we going through as a team? As an idea? As a program/campus/group?

3. Who or what influences what we value?

4. What aspects of our teams functioning empower people? What aspects of our team's (or group's or system's or organization's) functioning disempower people?

5. What do we know (that we need to know)? What don't we know (that we need to know)? What don't we know, period?