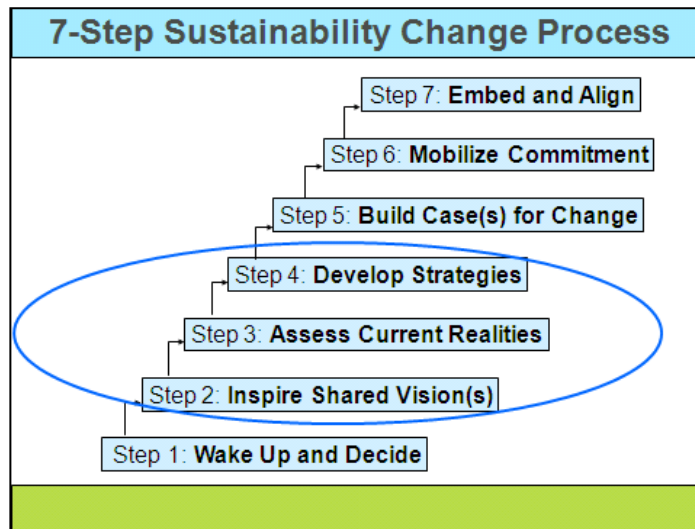


**Facilitator Guide**  
for  
**Vision, Current Realities, and Strategies Workshops**

The three workshops are designed to accomplish steps 2, 3, and 4 in the 7-step sustainability change process as described in *The Sustainability Champion's Guidebook*.



Your role is *not* to tell them what their vision should be, nor to convince them to embrace your vision, nor to tell them what they should do next. Your role is to facilitate dialogue and *their* buy-in for the resulting visions, strategies, and action plans. You do this by:

- Ensuring that all views are respected—that they all feel heard.
- Ensuring that everyone has an opportunity to speak—that no one dominates the conversation. It may be useful to establish norms in the first session.
- Encouraging coaching among members of the team, so participants feel co-ownership for their vision and action plans.
- Intervening with suggestions when they are stuck, or are not noticing something they might find helpful.
- Ensuring that they stay on topic.
- Enabling consensus on which visions, forces, strategies and action plans are the highest leverage ones with which to start.

This guide is based on Brian Kelly's, Bryan Smith's, and Bob Willard's experience with facilitating these kinds of sessions in the Sustainable Enterprise Academy (SEA), in the Sustainability and Education Academy (SEdA), and with other organizations, 2005-2011. Figures are based on slides in Bob Willard's [Master Slide Decks](#) at that time.

## **Visioning Workshop**

(90 minutes)

### **Purpose**

This session gives your team a chance to develop an aligned set of vision(s) for their organization.

This is the first of a trio of workshop sessions: (1) Vision, (2) Current Reality, and (3) Leverage Points for Action / Action Plans to close the gap between Current Reality and their Vision.

### **Learning Outcomes**

At the end of this session, participants will be able to:

- Explain at least three aspects of their Vision for their organization
- Convince others how this is a breakthrough, compelling Vision
- Estimate how far in the future each Vision element could be realized

### **Materials**

- Flipchart stand with paper and pens
- Lots of post-it notes and sharpie pens in the middle of the table
- Masking tape,

### **Flow of the Session**

#### *1. Introduction / Orientation (5 minutes)*

- Explain that this is the first of a trio of Learning Team sessions in the development of an implementation plan: (1) Vision, (2) Current Reality, and (3) Leverage Points for Action to close the gap between Current Reality and their Vision.
- Orient them to the way the wall will be used: Vision elements at the top, Current Reality elements at the bottom, and Leverage Points for Action in the middle

## 2. Brainstorm characteristics of good Visions (10-20 minutes)

- Ask who has been through a Visioning session before. Encourage them to help make this one work for everyone.
- Reference the Guidelines for Visioning and ask them to check off the best 3 tips for good Visioning, from their point of view. Then compare their thoughts.
- Write “More Tips about Visioning” on the flipchart and ask them to add additional ideas of how they would know a good Vision if they saw one.
- For inspiration, suggest they focus on what’s important to them as individuals. Synergies with some family / personal things may be good to consider in their organization’s Vision.
- Remind them they are working on individual “Facets of the Diamond,” and each post-it note will be one of those facets.
- Remind participants that they now have an instant promotion to leader of their organization so they should assume an organization-level perspective.
- Imagine that you are flying over your organization 5-10-15-25 years from now:
  - What does it look like? What’s different?
  - What are the employees doing?
  - What are people saying in their conversations?
- Remind them of the V1, V5, V10, V15, V20, and V25 portfolio of Visions for 1 year out, 5 years, etc. Encourage them to note the time frame on the corner of each post-it, and to ask “Then what?” after each to stretch their thinking to the next Vision over the horizon.
- Encourage team think creatively —to go where no one has gone before.

### Guidelines for Visioning

- **Aspirational:** What you want, rather than the “how” of getting it. The “desirable” vs. the “possible.” Really reach!
- **Positive:** What you want, rather than avoiding what you don’t want.
- **Big picture / “so whats:”** Include the **positive consequences** of achieving what you want. What would newspapers, employees, and the community be saying about you?
- **Expansive / Feelings:** Include not only the results or conditions you want to create, but also **values** you embody and your state of satisfaction or accomplishment.
- **Present tense:** So that you experience its power.
- **Relevant:** To organizations priorities

### Shared Visions – Facets of a Diamond



A compelling sense of **shared aspiration** which **permeates the organization** and gives **coherence** to diverse activities

Bryan Smith, as used in York University’s Sustainable Enterprise Academy

### A Portfolio of Visions



Bryan Smith, as used in York University’s Sustainable Enterprise Academy

- Encourage them to use Factor 10 (10 x results with same resources and / or same results with 1/10 of the resources) to force themselves out of their paradigm ruts.
- Encourage “the goal is zero” or “beyond zero” thinking to overcome incremental thinking e.g. Instead of reducing energy needs by 10, 20 or 30 percent, have a Vision of buildings being net producers of energy that could be sold back to the grid. It changes the entire paradigm and forces more radical thinking. Seek agreement that we are running out of time for incremental solutions.

### 3. *Develop individual Vision elements on post-its* (15-20 minutes)

- Ask them to work on the yellow post-it notes with dark coloured pens and individually “brainstorm” ideas for Visions of sustainability in their organization 25 years into the future.
- Each post-it note has one idea / theme / goal. Each person creates a small pile of them, individually, and silently.
- Part way through, give them a time check and remind them of the characteristics of good Visions on the flipchart and in their notes. Push for “How would you know it if you saw it”-type metrics.

### 4. *Post and discuss Vision elements* (45 minutes)

- Once everyone has finished generating vision ideas, ask for a volunteer to start posting vision elements in the top Vision section of the wall, explaining each as they do so. Have them string their post-its out horizontally and encourage subsequent people to cluster their similar Vision elements together vertically when they post theirs.
- Encourage people to ask each other questions for clarification, but not to get into the “How?” issues.
- Remind them that ideas for Vision can come from others (“plagiarism is encouraged in Visioning”). Encourage them to add additional elements to their own Visions if new ideas are triggered by what others say.
- Have them do a “silent sort” of the clusters. Everyone moves the post-its of similar ideas into clusters. Ask for a volunteer to use a different colour pen to create a post-it label for each cluster of similar vision elements. They do this silently, and can move elements back if they do not agree with how someone has sorted them. They are done when they have labelled clusters.

### 5. *Escalate the Visions* (10 minutes, if time permits)

- Some Vision elements may be vague, and limiting. Encourage “Stretch Visions.” Help them “escalate” their Visions by saying “Congratulations, you have achieved this Vision; now what could you achieve?” Try rewriting or clarifying the Visions into more aggressive, more compelling, more quantified Visions. This could be done in groups of two.
- Ask “Once you’ve achieved your goal, how will you know that you have succeeded in a true paradigm shift, that you have led people in an entirely new direction?”
- Remind them of the emotional test: “How would it feel if you could achieve the desired future state? If it’s not exciting to them, it won’t be a compelling vision for others.

6. *Wrap-up* (1 minute)

- Thank them for their engagement.
- They will have a chance to add to their Visions after sleeping on them tonight (if it is an overnight session) or being sparked by ideas they pick up in conversations with other participants.
- Encourage them to consider running a similar session with appropriate people back in their organizations and to take advantage of learning in these sessions: facilitation techniques on how to do a Vision, Current Reality, and action planning session. This value-added learning is an “aha” for some participants.
- Good work! Time for a break? 😊

## **Current Reality Workshop**

(90 minutes)

### **Purpose**

This is the second of the trio of Learning Team sessions: (1) Vision, (2) Current Reality, and (3) Leverage Points for Action / Action Plans. Current Reality is an assessment of where they are today compared to their important Vision elements.

### **Learning Outcomes**

At the end of this session, participants will be able to:

- Identify helping and hindering forces, relative to their important Vision elements
- Explain the relative strength of these forces to others

### **Materials**

- Flipchart stand with paper and pens
- Lots of post-it notes and sharpie pens in the middle of the tables
- Masking tape, just in case

### **Flow of the Session**

#### 1. *Introduction / Revisit Visions* (10 minutes)

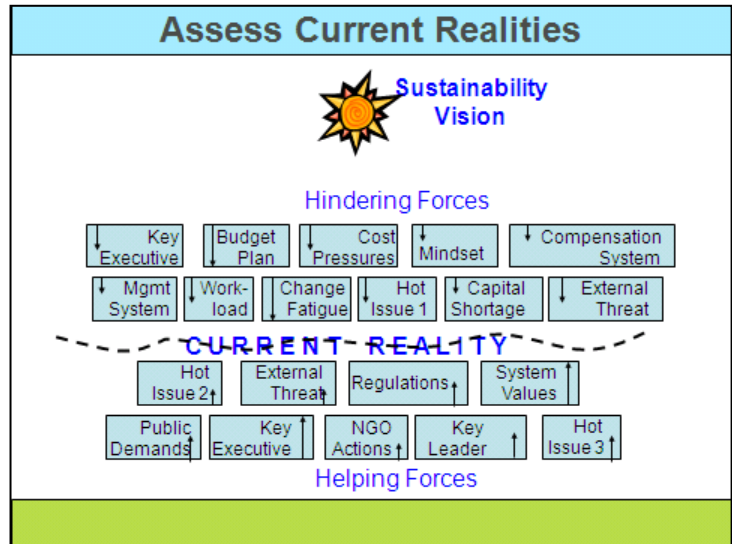
- Remind them that this is the second of the trio of Learning Team sessions: (1) Vision (2) Current Reality and (3) Leverage Points for Action / Action Plans
- Give them 5 minutes to quietly reflect on their Vision elements and add to, change, or rework them to make them more compelling, having had a night to sleep on them.

#### 2. *Subset their top 3 Vision elements / clusters* (10 minutes)

- They can't do everything at once so they need to get focused on which Vision elements they want to work towards first. Remind them that one of the tips for good Visions are that it is "something that you care about." Encourage them to select 3 of the Vision elements / clusters that really excite them personally. Those are the priority areas they will work on from now on. They individually check three cluster labels with their votes and democracy wins.
- Reassure them that clusters not chosen are still important ... for later consideration, some other time. But not right now.

3. *Develop their Current Reality “Force Field”* (45-50 minutes)

- Using the flipchart, demonstrate how to build their force fields. Array post-its representing Hindering Forces pointing down / away from their Vision above the Current Reality (CR) line, and array post-its representing Helping Forces pointing upward toward their Vision below the CR line.



- Remind participants that Current Reality is not just the “bad news” as opposed to the “good news” of the Vision statements. Current Reality is what we have to work with, as a sculptor works with a lump of raw clay.

- “Forces” could be people inside the organizational hierarchy, external individual or organizational stakeholders, dominant “hot” issues preoccupying people, budget realities, workload, threats to the organization, relationships with important stakeholders, senior supporters or blockers, internal cultural alignment toward sustainability, core competencies, market pressures and opportunities, etc. They should be relevant to the Vision clusters that they are working on, rather than boiling the ocean.
- Mention that they may be surprised to discover that some forces are both helping and hindering. It’s okay to show them that way, twice. Potential forces for or against sustainability progress might be: current problems, hot issues, threats to the organization, relationships with important stakeholders, senior supporters or blockers, internal cultural alignment toward sustainability, core competencies, market pressures and opportunities, etc.
- Have participants individually produce post-it notes for the force field elements of Current Reality that occur to them. Have them label their notes with an up or down arrow to show whether they are helping or hindering forces and three different arrow lengths to signify the strength of the force.
- Participants cluster similar forces, eliminate duplications, and label their groupings, as with the vision elements. This can be done with talking.

4. *Wrap-up* (1 minute)

- Congratulate them on their good work.

## **Action Planning Workshop**

(90 minutes)

### **Purpose**

This is the last of the trio of Learning Team sessions. The purpose of this session is to help participants thinking about the development of strategic points of focus. These are the major leverage points or action areas to focus on, to bring their organization's vision for sustainability into reality. This final session ensures participants leave the session with a few specific actions items that they can confidently accomplish as the first steps toward their Visions.

### **Learning Outcomes**

At the end of this session, participants will be able to:

- Identify high Leverage Points for Action they should focus on
- Execute the first three steps toward their Visions within the next week.

### **Materials**

- The breakout room already has a wall with their Vision and Current Reality force fields post-its on it
- Flipchart stand with paper and pens
- Lots of post-it notes and sharpie pens in the middle of the table

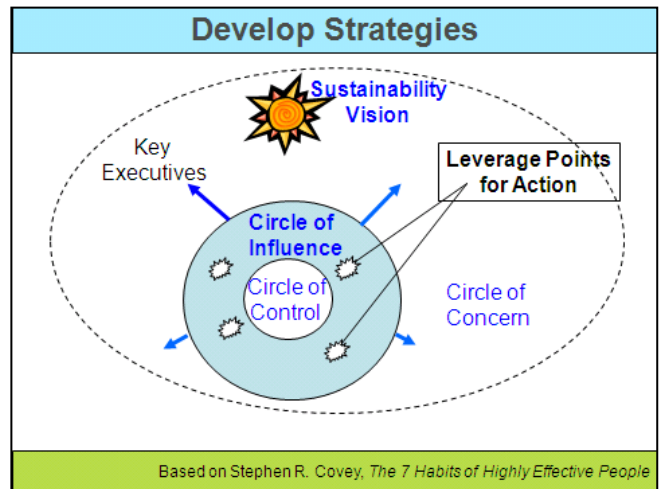
### **Flow of the Session**

#### 1. *Introduction* (15 minutes)

- Give them a chance to reacquaint themselves with their Visions and Current Realities on the wall. Ask them to zero in on 3-4 high priority hindering and / or clusters of forces they need to overcome or tap into.
- In order to achieve their visions, they must focus on areas that could be converted eventually into clear, specific, and operationally effective initiatives. Encourage them to think of those areas that are most promising and most interesting where they could begin to take some action soon.
- These focus areas should have clear links to the organization's success, including addressing significant opportunities or risks. Strategic focus areas provide the foundation for progress towards meaningful goals. They are not abstractions. Name the issues, people, organizations, etc.
- These focus areas are the means for mobilizing and directing the resources and energies of the organization. Look for "early wins" candidates that will create confidence and momentum.



- On a flipchart or whiteboard, draw the diagram, opposite. The Circle of Control in the middle represents what they control personally; Circle of Influence expands as they exercise the Leverage Points for Action in it. The largest one is the Circle of Concern which includes their Vision and other things they care about. They get to the Circle of Concern by expanding their Circle of Influence.



- Elaborate on “trim tabs,” “trigger points,” “strategic points of focus” or “strings they need to pull.” They are critical to getting things done in their organizations. They might be key customers who are allies; influential people in the organization; influencers whose support is critical; external stakeholders who your executives listen to and trust; hot-button issues that can be piggy-backed; etc. They help “lubricate the channels” to key decision makers. Encourage the “influence the influencers” strategy to reach key executive decision makers.

### The “Trim Tab” Approach to Change

“Something hit me very hard once, thinking about **what one little man could do**. Think of the Queen Mary – the whole **ship** goes by and then comes the **rudder**. And there’s a tiny thing at the edge of the rudder called a **trim tab**.

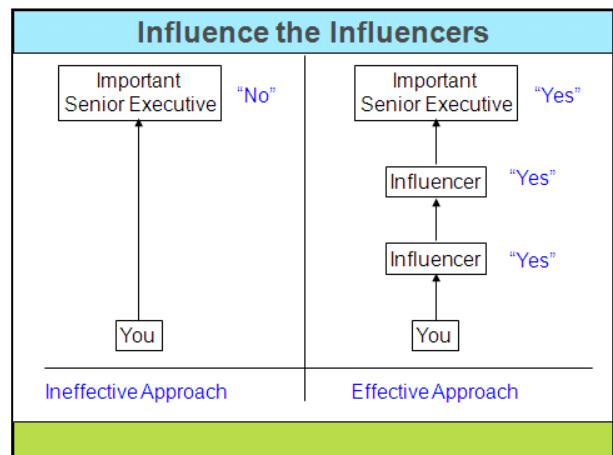
It’s a miniature rudder. Just moving the little trim tab builds a low pressure that pulls the rudder around. Takes almost no effort at all. So I said that **the little individual can be a trim tab.**”

– Buckminster Fuller –

Bryan Smith, as used in York University’s Sustainable Enterprise Academy

## 2. Identify Leverage Points for Action (30 minutes)

- Have them individually and quietly identify 3-5 that would help overcome the relevant hindering forces, enhance the selected helping forces, and move them toward their Vision. For example, encourage them to name three key people / influencers who they want to get on board for their Vision.
- Then have them post their “strategic focus areas” / “leverage points” on their wall sheets in the gap of creative tension between their Visions and Current Realities. Encourage others to build clusters of similar ideas as they post them.



## 3. Action Plan / Next steps (40 minutes)

- Now that they have identified the high leverage focus areas, they need to decide what they are going to *do* about each of them. That is, what are the *first steps* on their action plan?
- These have to be doable within the next week or they will never get done, and there can’t be more than 3 – 5 actions.

- Have each person identify 3-5 actions you will take in the next week to get started. They should align their actions with the leverage points identified. Be specific.
- Remind them of the elements of a good action plan. (I.e. Who / will do what / with whom / by when). Seed their thinking with a few examples:  
*e.g. I / will set up a meeting / with Sam / to review my Vision and Action Plan from this session / by (date)*  
*e.g. I / will ask my assistant / to include a Sustainability Vision discussion on our next department meeting agenda / by (date)*  
*e.g. I / will call (who) / to set up a coffee/ lunch meeting to get their advice and support / by (date)*
- Have them pair up and explain their action plans to a partner, using their Vision and Current Reality as context. Then quickly have everyone share their action plans, to help build their public commitment to them.
- Discuss change champion hints and tips, like ...
  - a. Before you meet with someone, make sure you consider their interest points. Where do their motivations lie? What are their preoccupations? What are they already driven by? What are their priorities? Do they pose a barrier to your achieving your goals? Why or why not?
  - b. Change agents are good salespeople. Use effective sales techniques.
  - c. Focus on the sustainability vision – it's not about you! The irony of leadership is that you must inspire and empower others to move your Vision forward.
  - d. Go slow to go fast. Listen, learn, and then propose.
  - e. Influence the influencers in the chain to your key person(s).
  - f. Sometimes it is wise to encourage the key decision maker to feel like it was his/her idea.

#### 4. Wrap-up (10 minutes)

- Ask them when a good time would be to check back on how things are going and book the date and time.
- Ask how many might consider running a similar session for kindred spirits in another network / group that they are connected with in the organization. Encourage them to consider doing so, to help build a groundswell of stakeholders collaborating to convince senior executives to lend their support to the transformation. Share these facilitator notes with participants to help build their confidence and competence as facilitators of similar sessions with other groups. Empower and enable them to be co-leaders of the change.
- Thank them again. Done!

