Tool 2

VISION JOURNEY

Steps and Workshop Facilitation

Participatory

Action

Learning for

Sustainability

Toolkit for
GYEM Ethiopia

Linda Mayoux
and
Sarah De Smet

with
GYEM staff
and champions

FUNDED BY COMIC RELIEF

SNV

Introductory narrative

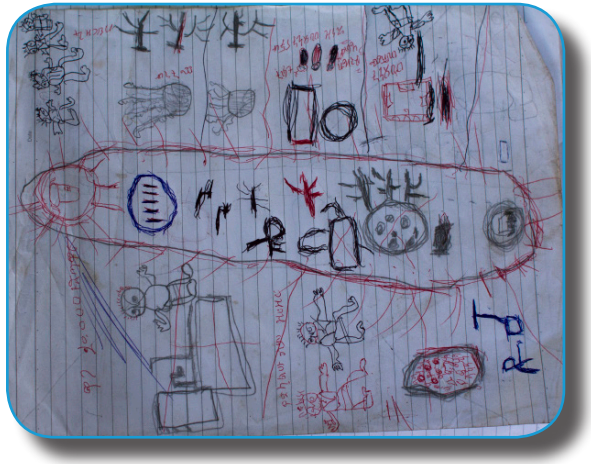
Horticulture is a means to an end - improving horticulture production gives increased income to achieve our broader visions for ourselves and our families.

We need to start our road to the future somewhere - to start to have faith in the possibilities of progress and change and to develop the habit of visioning, planning and assessing our progress.

In this session we learn a planning tool - called a Vision Journey. This has helped many farmers (women and youth as well as men) to use money from horticulture and other activities to achieve parts of their vision - higher education for children, better houses, buying land, setting up new businesses, buying cars (that women as well as men can drive).

For this first Vision Journey, start with something very concrete and simple. Choose one important thing from your Vision drawing that you think you can achieve in a specific timeframe, and with significant progress in one year.

Later you can use the same tool for other things. Once the basic principles and steps have been learned, it is then possible to move on to bigger and more ambitious dreams.



© Linda Mayoux : December 2017

Aims

The Vision Journey tool produces a plan to help people work towards one realisable element of their vision from the Soulmate Visioning activity (See Tool 1 in this Toolkit). Often this is a small business, a house improvement or sending children to school - as part of the longer term vision.

It places the role of horticulture production and marketing in the context of a wider individual, family and community vision. As a basis for identifying ways in which farmers and cooperatives can work together to achieve their respective visions.

Discussion of gender issues from the Visioning process is continued - starting with marking ownership of assets in the vision, and followed through in the other steps.

The Vision Journey tool can itself be developed into a quantified business plan for different types of economic activity. Or used as an introduction to more advanced business training.

In particular it forms the basis for the much more detailed cash flow and opportunity/risk analysis in the Livelihood Management Calendar.

For individual farmers and staff

- introduces basic planning principles and steps
- clarifies the vision, and the role of horticulture in achieving the vision
- identifies people's current position in relation to their vision
- introduces the importance of setting realistic, time-bound targets with tracked milestones and actions
- promotes brainstorming and sharing ideas on opportunities and challenges
- introduces and reinforces a culture of planning and reflexive learning
- reinforces basic drawing and analytical skills.

For organisations

- increases understanding of people's wider visions and how these relate to cooperative horticulture production targets.
- clarifies the current baseline situation and how people themselves can plan to achieve their vision.
- increases understanding of opportunities and challenges and possible roles for the organisation.
- increases understanding of the similarities and differences between women, youth and men from different backgrounds and as individual people.
- improves participatory skills of staff and communication with women and men farmers with whom they work.

© Linda Mayoux : December 2017

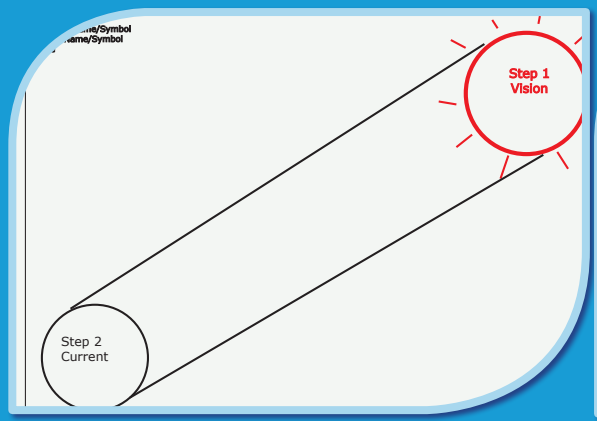
Steps

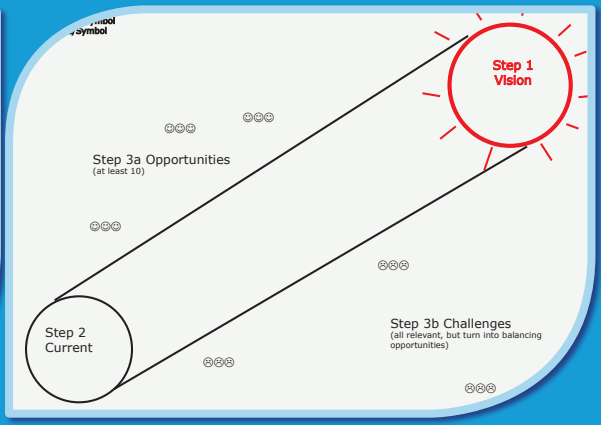
This Vision Journey is drawn on the next double page after your Vision.

Make sure the diagram is the right way up - from bottom left to top right. Do not copy upside down from your neighbour opposite.

Sketch first in pencil if you are not sure.

Remember to put the date in the top left hand corner.





1 First circle – future

Draw a large circle at the top right hand corner of your page.

This represents the future. It is a large circle at the top because it is like a sun and you are reaching for the sky.

Here you put one key thing from among those in your soulmate vision.

It is the vision that will inspire you to pick yourself up, and continue to move forward if you fall and stumble on the rocks along the road.

2 Second circle and lines - present and linking road

Draw a second large circle at the bottom left hand corner of the flipchart. This is drawn in black and represents the present situation.

Draw two straight black lines to link both circles. This represents your road from the present (bottom) to the future (top). The road is straight and upwards, because this is how you hope you will reach up to your vision.

In the bottom circle draw how your current starting situation is for the thing you have chosen to put in the vision circle eg if you want to have a big farm, how much land and crops do you have now, do you yourself have title to that land, how much savings do you have to purchase it.

3 Opportunities and challenges

On either side outside the road draw:

- at least 10 opportunities at the top of the road - the things which will help you up if you fall down. The more opportunities you think of, the quicker you will advance.

- at least 10 challenges go under the road because these are the things which can drag you down. Do a thorough risk analysis. You need to foresee as many challenges as possible in order to avoid them.

The things which are most under your control are put nearest the road. The things which you cannot control go furthest from the road.

If challenges are many then try to identify corresponding opportunities that can help you address the challenges, eg buying mosquito nets for malaria. Try to make this balance.

© Linda Mayoux : December 2017

Steps

Colour-coding is important to establish.

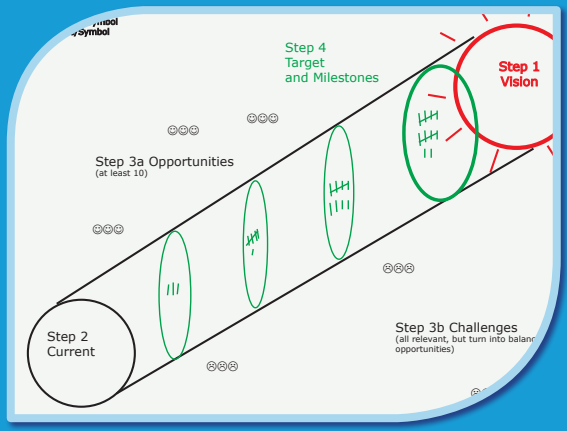
The drawing of the Vision Journey follows the generic PALS colour coding:

***Red** is for the inspiring vision and then for achievements.*

***Black** is for the current 'African' situation and the road lines.*

***Green is for the plan** - the target, milestones and actions - are drawn in. They are currently 'unripe'.*

The aim is to make the progress and achievements very visible through the amount of red replacing the green.



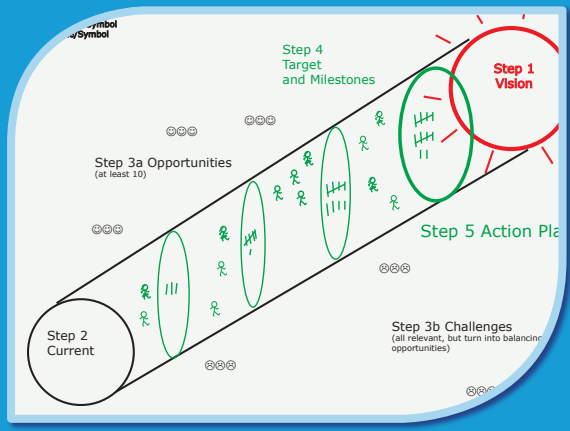
4 SMART target and milestones

Every journey starts with small steps. Your vision is a long term dream. Now you need to plan realistic timebound steps - given your opportunities and challenges.

Draw a circle with a thick green line right next to the vision. This is your 'SMART' 1 year target. Put symbols in green to indicate what you think you can achieve in 1 year towards achieving your vision.

Then put 3 - 5 thin green circles along the road as milestones - what you can achieve by specific times. The first circle should represent about 1 month's time. The rest are 'monitoring points' you will aim for eg harvest, Eid/Xmas.

Leave enough space in between the circles - that is where you will put the actions.

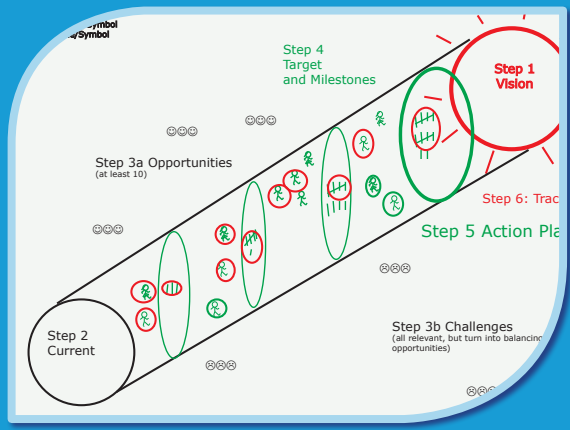


5 Action plan

Now you need to think about the actions needed to move from one milestone to the next - to make sure you sieze opportunities and avoid the challenges.

Put symbols for the different actions in green. If you are making assumptions that your family members will help, be sure to make this clear - and think how they will be persuaded and rewarded.

Revise the milestones and target if necessary. As you reflect in more depth you may also think about further opportunities and challenges.



6 Track

Tracking is important not only for project monitoring, but for learning and progress of farmers themselves. They see which fruits have been achieved and ripened, which have perished, which are still in process, and maybe new green ones.

Green to red: Farmers track progress in implementing their plan by circling green achievements and/or actions with red as ripe fruits. Opportunities attained can also be ringed in red. Challenges successfully overcome can be crossed out in red.

Green to green: Some things may be achieved more quickly than anticipated. Things that go slower and are not achieved or done by the expected time should be redrawn in green to the next milestone.

Green to blue: Things that will never work out, or are no longer necessary, should be circled or crossed out in blue to represent the perished fruits.

All individual achievements, and learning on opportunities and challenges, should be discussed within families and groups. They can also be quantified on group Vision Journeys.

© Linda Mayoux : December 2017

CHAMPION PICTORIAL STEPS

SHARING STARTS FROM DAY 1

People should start sharing informally from day 1 - while interest and memories are hot. Peer sharing is not just a charitable and unsustainable chore. It is essential for reinforcing participants' own learning, and bringing about change - it is easier with support from family and friends and not struggling alone.

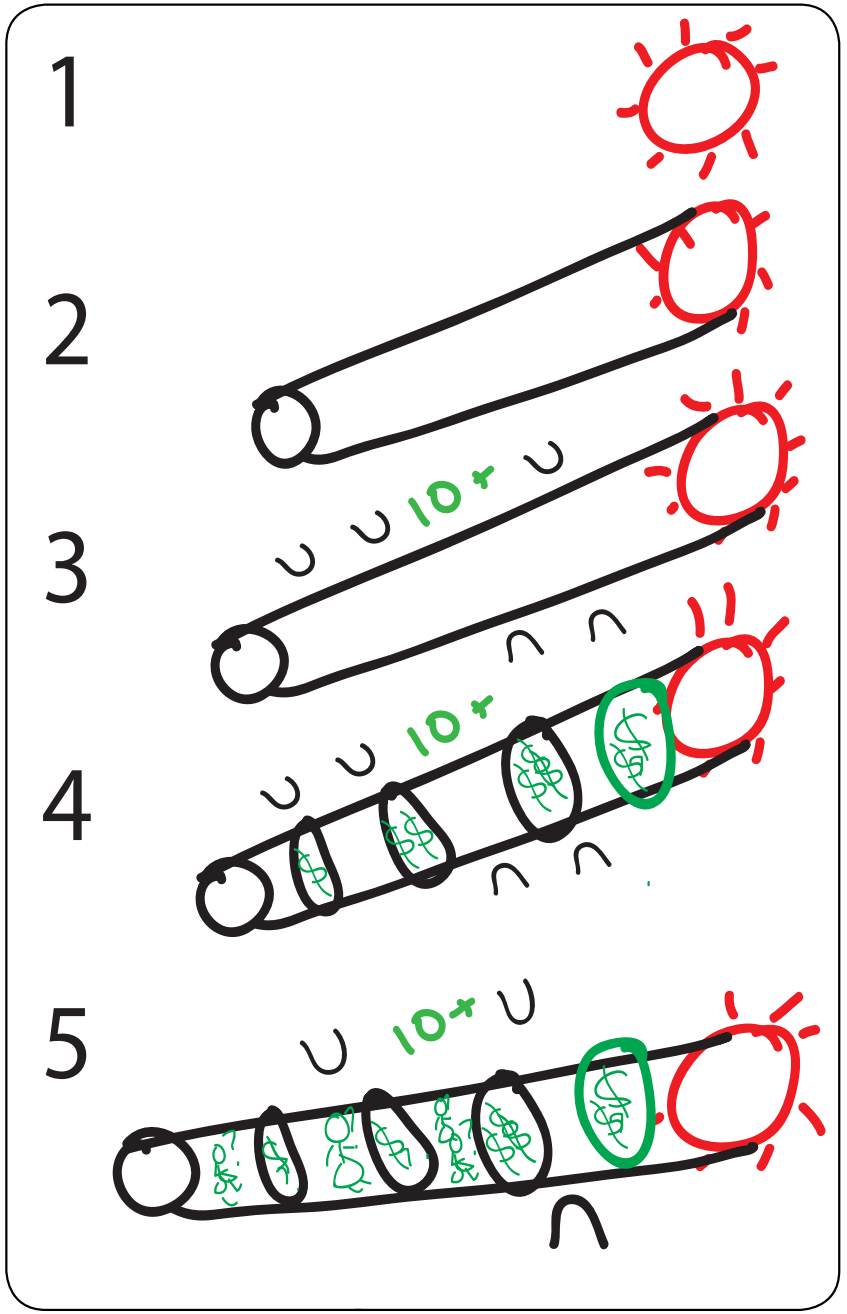
At the back of their notebooks they should carefully and neatly copy the steps on the right. Champions' individual plans can be flexible. But it is crucial that these steps are clear for everyone the same. So those they share with can also copy for the chain peer sharing. IT IS ESSENTIAL FOR THE VOLUNTARY UPSCALING THAT NO SEPARATE CHAMPION MANUAL SHOULD BE REQUIRED.

The very first evening when champions go home they should share the Vision and Vision Journey with at least 2 members of their family or friends.

What they share with others are the pictorial steps. Giving people a sheet of paper from their own notebooks and lending their pencil and pens. So that those people do their own plan themselves.

Then - only at the end - they can compare their own vision and learn from each other.

If all members of a family of friend group share their visions and plans this helps them understand each other and work together.



Peer sharing is discussed in more detail in Tool 2 Change Leadership Map. By the end of the training they will have pictorial steps for all the tools, and have practised role plays of sharing at different levels.

If champions share the tool with other people in their support networks so those people also have their own visions and plans, these people will be able to share their ideas for the future and work together to obtain opportunities and address challenges.

© Linda Mayoux : December 2017

Facilitation overview

Afternoon of first day of the 5 day catalyst workshop.

When used for peer sharing, the champion:

- *explains the purpose of the tool*
- *asks the person learning to:*
- *think back to their own happy life vision*
- *goes through the steps at the back of their notebook (above)*
- *fills in the plan*
- *finally they can compare and share visions*

The person should have bought a notebook together with pencil or pens. Or - just for Vision and Vision Journey - the champion gives them one sheet from their own notebook and lends a pencil.

Participant preparation	Participants need the vision from the Soulmate Visioning exercise, their notebook diary and 4 different coloured pens - red, blue, green and black (if these are not provided by the organisers). Song from Session 1 homework
Facilitator preparation	Familiarise yourself with the tool and draw your own Vision Journey Prepare an introductory explanation from the overview above - make sure this is brief and to the point. Read Guidelines for Interactive Tool facilitation in GYEM Facilitation Guide 'Fun with a Serious Purpose'. Put up a blank flipchart at the front of the room for the participants to progressively develop the Vision Journey tool - this time the facilitator must not hold the pen. Make sure the seating arrangements are appropriate for people to sit comfortably in groups while doing individual drawings. And that there are passageways for people to come up and contribute from the front. Seat yourself now to the side, not at the front.
Materials/ prepared inputs	Notebook diaries with coloured pens. A blank flipchart for the front of the room and coloured markers placed for people to come up and draw.
Timing 3 hours with healthbreak	Pairwise introduction with new partner - discussion of what participants learned in the morning session. What did they like? What did they not like? Plenary feedback from volunteers focusing particularly on any need for clarification (15 minutes) Brief overview of afternoon session using the introductory narrative (5 minutes). Interactive presentation of the tool steps while participants draw their personal Vision Journey on first 2 page spread in Notebook Diaries.(1 hour 30 minutes including brainstorming and sharing on opportunities and challenges) Recap on steps for pictorial manual at the back of the notebooks (20 minutes) Facilitator wrap up including homework and sharing (15 minutes)
Outputs	Individual Vision Journeys with milestones and actions for the next 12 months in notebook diaries. These are then tracked over time. Participants know the tool steps that they can then apply to other vision elements, and as the basis for the much more detailed Tool 6: Livelihood Management Calendar.
Homework for participants	To complete their vision journey, building on the inputs from others To make any clarifications on the steps of the vision and vision journey at the back of their books and share what they have learned with at least 2 people (maybe spouse and children) before the second session. To bring their Notebook Diary and coloured pens to the next day
Homework for facilitator	Monitoring should not be done at this stage as it detracts from champion ownership and empowerment, but make notes on possible vision indicators that the organisation might decide to track eg increases in incomes, changes in property ownership of women and youth, women driving - among many other possibilities. Reflect on how the facilitation went, and any changes that will be needed in the following days.

Facilitation Guide

Brief introduction 5 minutes.

Once the feedback from the pairwise exercise has finished, the facilitator should give a brief explanation of the Vision Journey as indicated in the narrative above. Stress that although this tool still uses mostly drawings, it will be a serious plan where numbers and financial calculations can be added. Many farmers worldwide have already used and benefitted - building beautiful houses with solar power and shining roofs, saving to send their children to university and setting up successful businesses. BUT KEEP THINGS VERY BRIEF. Explain more as you go through the steps, not too much at once.

Interactive Tool presentation and individual drawing 2 hours.

People draw individually but it is good to sit in informal groups - putting together those who have most difficulty in one group and the most advanced in another group to enable the facilitator to easily give necessary support to each. It is best that those who have initial difficulties can encourage each other rather than feeling they are dominated, and also do not just sit back and let others do the work. Those who are more advanced need to move ahead quickly with more complex analysis to add to the discussion later, also so they can see how sophisticated and useful the tools can be to help plan and think things through - not just childrens' drawings. Separate men and women if one is likely to dominate the other.

Sit at the side and go through the basic steps interactively - step by step - (See GYEM Overview Part 2 Facilitation Guide). Invite people to come up and draw each step of the framework. They should first indicate with their hand what they will put. Ask other participants if they agree. Then the step is drawn on the flipchart. This both reinforces learning, and avoids making a mess and having to keep changing the flipchart. As things are drawn at the front, people draw the framework and their own plan in individual notebook diaries. And remember the applause as the person drawing at the front goes back to sit down!

Invite suggestions on examples at each stage. But **do not to draw specific symbols** because then people are likely to just copy those - like good children - not think for themselves like adults. Then they will not have anything they themselves can take seriously and implement as their own plan. It is best to give non-stereotypical examples - like women getting a car or lorry or becoming an airline pilot, a man buying land for his wife, rather than common ones like building a house. Gender issues should continue to be raised, continuing from discussions on the vision - like who owns the house or car and make sure people put symbols eg document between woman and man for joint ownership.

Go slowly giving time for people to draw in their notebooks. Never touch the pen yourself. Make sure everyone is engaged all the time - either through taking their own analysis further or helping and discussing with others who are at the same understanding level. **Everyone must draw everything themselves. No one should ever touch the pen for anyone else.** If given space and time, encouraged and not patronised or laughed at, even very old women who never held a pen are drawing in about 15 minutes. They then become very comfortable and even expert after a few sessions.

Key points that may need continually emphasising are:

- the importance of doing a serious plan that they will really implement. Particularly people with formal education may think drawing is just 'child's play'. PALS drawing develops advanced visual communication skills (see Facilitation Guide). Adults are therefore expected to do a plan like adults, not be satisfied with a children's simplistic drawing. Push them to put as much detail as possible without undermining confidence. They should put cash amounts and calculations and make sure these make sense. Or they won't succeed. And won't have developed the necessary communication skills for what follows.
- the importance of identifying as many opportunities and challenges as possible - particularly ones over which they may have some control. That deep reflection and brainstorming will help people advance more quickly. It may be very useful to discuss with their families and neighbours on this when they get home.
- the need to separate out the milestone targets from the actions needed to attain them. That is important for future tracking and monitoring - it is the actions that people can control, not necessarily whether they fulfil the targets. They will track which actions are successful and which are not, and revise their targets accordingly.

Finally **make sure everyone has the pictorial steps at the back of their notebooks** - this is essential at this point. Shorten gender discussion if necessary - that can be done later. Sharing should start the very first evening 'while the iron is hot'.

Facilitator Wrap Up and homework 15 minutes

The facilitator gives a brief wrap up - outlining different dimensions of a vision and opportunities which have come up. The facilitator could also start to discuss some important gender and/or youth issues that have yet not come up – without imposing their own view. The best way is to refer to issues that are known from research, or mentioned by champions elsewhere.

Explain the homework - **particularly sharing the tool** and helping others at home to draw their own plan.

Issues from experience

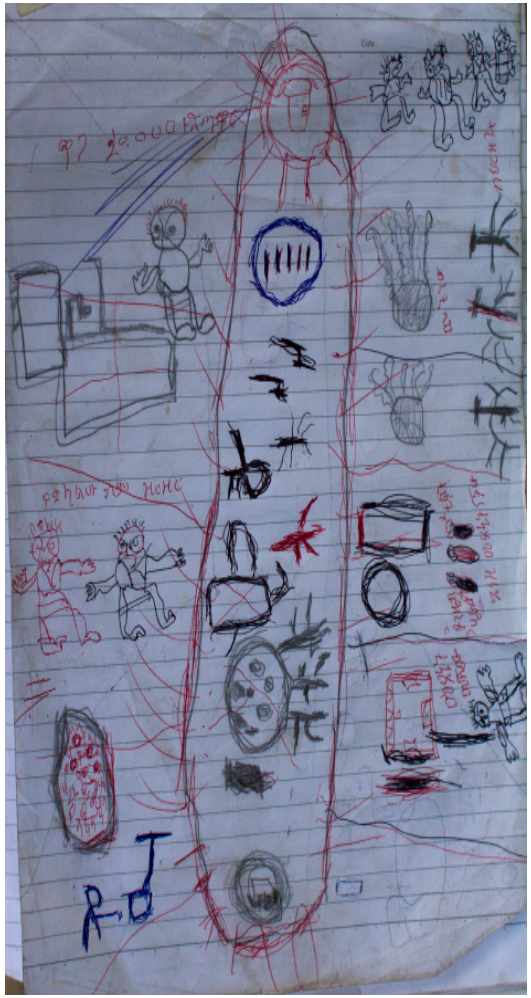
As with all PALS tools, it is important to start simple and help participants develop their own confidence in analysis. People must feel they own this first Vision Journey as their own.

This first vision journey is often the first time people have thought much about planning for anything in the future. It is very important not to overload it with too many details. The degree of detail at this stage will depend very much on:

- the outcomes of the soulmate visioning exercise which provides the vision
- the degree to which people develop their drawing skills so that they can draw a lot of detail in a small space. Even people who have never held a pen before can use their brain and do a plan with simple calculations.
- how seriously the participants take the exercise - this depends also how serious the facilitator is in drawing and analysis. People who have formal schooling can produce strategic plans using symbols that are as detailed as conventional cash flow charts etc but related to a vision and with SWOT analysis.
- the numbers of participants per facilitator and the level of previous experience they have with gender and/or participatory methods.

There could be a slot here for norm setting and comment on/give any suggestions about changes in the process or participation, eg if there is a need to have norms on mobile phones/people not interrupting each other.It will be more useful and participatory at this stage than doing this at the beginning. But often no specific norm-setting is necessary if it is just clear that everyone is expected to behave like respectful and responsible adults.

Good facilitation from the back means that there should be little for the facilitator to add. Briefly summarise the action conclusions, comparing these to the checklist below, or previous exercises from your own experience.



The example above was drawn by a woman who could not read and write one day previously. It does not exactly follow all the steps above. But there is a lot of thinking and analysis. This woman then went on to learn numbers in the following days. She also shared with her family and neightbours and spoke very forcefully about the importance of visioning and planning at the community meeting. It is the thinking and inspiration to share and speak in public that is the aim at this stage. Details of the tool can be tightened up later on the Livelihood Management Calendar.

© Linda Mayoux : December 2017

Facilitation Checklist

NOTE

At this stage facilitation should not be too directive.

Except on the pictorial steps and sharing back home.

DO

- Make sure
  - ◇ everyone is having fun and drawing their own diagrams for themselves, and understands the importance of drawing
  - ◇ people become convinced of the importance of planning and understand the basic principles and steps outlined above
  - ◇ those with no formal education are enjoying drawing, confidently sharing their ideas with everyone else and understand the basic steps
  - ◇ those with higher levels of education are pushed as far as possible to take things seriously, and have detailed cash amounts and calculations for a serious implementation plan - not just simplistic drawings they did as children
  - ◇ to continue to follow through on gender issues from the vision, with a bit more emphasis, but keep it light and suggestive. Not preaching a gospel.
- Check that everyone:
  - ◇ is using two consecutive pages to give enough space for lots of drawing, and these pages come at the front of the Notebook after the Vision
  - ◇ is drawing the right way up and to top right from bottom left - often people are sitting opposite each other and copying and may draw up-side-down
  - ◇ has visions that are reasonably realistic in a few years
  - ◇ understands the difference between the vision and current circles
  - ◇ are putting on people and considering gender isues: who owns what, who contributes what and who gets what
  - ◇ has at least 10 opportunities and challenges, adding opportunities to balance challenges
  - ◇ has the one year target circle, with logically spaced timebound milestones with enough whitespace in-between to put the action steps
  - ◇ comes away inspired with dreams of the future, but with a realistic target and with some immediate action steps
  - ◇ has the pictorial steps copied exactly, neatly and clearly at the back of their notebooks for peer sharing at home.
- **Emphasise the homework of sharing**. Starting with their families and children. BUT NO ONE SHOULD DRAW FOR THEM AT HOME AND THIS SHOULD BE CHECKED NEXT TIME. WITH A BIT OF PRACTICE EVERYONE CAN DO IT. OTHERWISE IT WILL NOT BE THEIR OWN PLAN. They will be expected to report back on how things went the following day. Even if it is difficult, they need to try. Then the difficulties and how they can be overcome will be discussed to help them the following evening. Every evening they should spend some time to share.
- **End on time** to give people time to share at home.