

VISIONING TREE

A FACILITATION GUIDE

Participatory evaluation is an approach that ensures program participants are actively involved in evaluation activities from start to finish. The goal of the Visioning Tree exercise is to have participants spend time creating a vision and setting intentions for their efforts.

ACTIVITY DESCRIPTION

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WHAT IS IT?

The Visioning Tree exercise is an engaging and participatory tool for participants to actively engage in visioning the ideal state of the organization, group or program; reflecting on the current foundational components or assets they might build upon; and identifying the planned outcomes they hope to achieve.

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WHAT IS IT USED FOR?

The Visioning Tree exercise is used as an evaluation activity that helps groups create a shared vision of what they have to invest in their efforts and what they will accomplish. It helps group set intentions for what will come. It can be used as a visioning exercise, or as a program planning and analysis tool.

MATERIALS LIST

SUPPLIES

For this activity you will need:

- A large space or canvas to place the cards (Sticky Wall, large poster/chart paper, digital template)
- Masking tape to adhere the canvas to a wall
- Flip chart paper and markers to record the group agreements and reflection questions
- Notepads and pens/pencils for individual/small group brainstorming
- Cardstock cut into shapes for people to write their ideas on large enough to read
- VIRTUAL OPTION: Virtual meeting platform, PowerPoint presentation, a polling tool to capture responses, or a shared document (e.g., Google doc or screen sharing) to record answers electronically

LOGISTICS

Consider the size of your group and the space needed to allow people to comfortably participate in discussion. Plan the room layout, wall space and location for hanging the cards so everyone can see clearly. Arrange the room to allow individuals to do parts of the activity on their own (classroom style) or together in small groups (tables of up to 8). If you are conducting this virtually, you may decide to set-up small group breakout rooms using a virtual platform to facilitate the activity virtually.

HEADS UP!

If you are using a Sticky Wall, apply adhesive spray to the wall 24 hours beforehand so it can dry and the cards will stick. Bring an extra spray can in case you need to spot spray any areas are not sticky.

FACILITATION PLANNING



PREPARATION

The prep for this activity will depend on how many participants will be in the group you are facilitating. You may choose to do this as a whole group or break into smaller teams if there are areas with different goals. Things you will need to do include:

- Spray sticky wall or have a long piece of roll paper cut (you can draw the tree template on ahead of time or allow the group to draw it as an icebreaker activity).
- Cut out leaf shapes from half sheet pieces of green cardstock for the leaves on the tree, some ¼ sheet strips (from landscape orientation) in cream for the roots of the tree, and some half sheet pieces of brown cardstock for the roots and trunk of the tree. You can also cut out cloud shapes from white cardstock for clouds if you'd like, or you can write in the white space above the tree.
- Write group agreements on flipchart paper

Supplies and materials you will need include:

- Sticky wall/ roll paper
- Scrap paper
- Markers
- Pens
- Flip chart paper
- Masking tape



WARM-UP

- Orient group to the purpose of the activity
- Go over group agreements
- Use the metaphor of a tree to describe the picture you are trying to create together
 - Clouds = Ideal vision
 - Leaves = What is hoped to be created, produced, accomplished
 - Trunk = Collective strengths and assets
 - Roots = Individual strengths



CONDUCTING THE ACTIVITY

- Individual brainstorming
- Instruct how to write on cards:
 - One idea per card
 - 5-7 words
 - Write big
- Transfer clearest ideas onto cardstock roots, trunk, leaves, and cloud cardstock
- Have participants share ideas with the group and place on sticky wall/ canvas
- Scan for any connections between cards of the same part of the tree and move them together



WRAP UP

- Reflect as a large group to wrap up activity
 - What stands out
 - Are there any surprises
 - Last thoughts
- Share that group will get a document that reflects the work they did together
- Take pictures of the group's finished work so that, when you take it down, you can keep it organized and have a visual to refer to during analysis

FACILITATION PLANNING

Visioning Tree Activity – Facilitation Plan

Location:	Date:	Time:	# of participants:
Facilitator(s):	Rational Aim: To enable the group to create a shared vision of what they will accomplish with the community and set intentions for what will come.		Experiential Aim: To generate excitement about the possibilities of the organization or group by imagining the ideal state for their efforts and identifying strengths and resources that can help them achieve their collective vision.
Room set-up: Round tables for small groups to convene	Materials: Large sticky wall or roll paper; 4 sets of Cardstock cut to shapes of roots, trunk, leaves, and clouds; Visioning worksheet		Supplies: Cardstock, markers, masking tape, note paper, pencils/pens, chart/poster or mural paper

Visioning Tree Session

Introduction – Planting Our Roots	Creating a Shared Vision	Grow Our Trunk –Collective Strengths	Our Leaves – What We Hope to Create
<p>Hi everyone! We are so excited to be here today and to get to know each other better. [DO INTRODUCTIONS HERE].</p> <p>Everyone in this organization/group brings unique strengths to the world, to your community, and the work that we will do together. When I talk about strengths, I'm talking about your unique knowledge, skills, abilities, talents. I'm also talking about your personal contributions and expertise.</p> <ul style="list-style-type: none"> • First, we are going to brainstorm our personal strengths that will help support our work to make positive change for youth and young adult mental health. • On your own, make a list of your personal strengths on paper. • Share your list with the person next to you. • Tell the other person about how you believe each strength contributes to making positive changes in your community. • Pick your top 3-5 strengths and write them each on a small card. • Together as a group, take turns putting your cards on your tree and putting them at the root of the tree. 	<p>Visioning is creating a clear, specific, compelling picture of what our communities will look and be like in the future (~5 to 10 years from now). The vision is the ideal picture of how we imagine things will be; it is the picture of our hopes for our communities. Creating a shared vision gives us one direction that we are all moving toward together.</p> <p>a. Describe the tree: Point to the open sky (this is where we want to be as a result of our efforts).</p> <p>b. Close your eyes. Imagine yourself as an Eagle soaring above your communities 10 years from now. [TALK ABOUT FACTORS RELEVANT TO THE IDEAL STATE OF THE ORGANIZATION OR GROUP]</p> <p style="padding-left: 40px;">i. What do you see? What do you hear?</p> <p style="padding-left: 40px;">ii. What are people doing?</p> <p style="padding-left: 40px;">iii. How do people interact or treat one another?</p> <p>c. Open your eyes. Each person tell your group one word that describes your vision (round robin).</p> <p>d. Someone share your whole vision with your group. What did you see and experience?</p> <p>e. Close your eyes and envision your community in three years. Think about a usual day in your home, neighborhood, or organization, three years from now.</p> <p style="padding-left: 40px;">i. What do you see? What do you hear?</p> <p style="padding-left: 40px;">ii. What are people doing?</p> <p style="padding-left: 40px;">iii. How do people interact and treat one another?</p> <p>f. Open your eyes. Write down what you saw and heard on your Visioning worksheet.</p> <p>g. Ask people to share parts of their vision aloud. Writes key ideas down on the paper in the clouds above the tree. Be specific.</p> <p>h. Reflect: What do you notice about your visions? What do they have in common (what holds them together)? What seems truly important to us as a group?</p>	<p>The foundation of your success together is your collective strengths and how well you grow them together.</p> <ul style="list-style-type: none"> • Look at the roots, what do you notice? • Which of the strengths have similar ideas? Similar threads that stick together? • Move cards around to be close to similar ideas. Name the clusters of ideas. Write the name of clusters on a half card and put those cards on the wall in the trunk. • What is missing? What other strengths and resources do you have as a group or organization? What else is essential to supporting your success as a group? • Add additional cards as needed to capture the other strengths/resources/assets that exist within your organization and community. 	<p>As a result of combining your strengths you will grow and produce some amazing things together. What will you do? What will you accomplish together?</p> <ul style="list-style-type: none"> • First, brainstorm a list on your own (write down all of your intentions and aspirations for your work within your organization). Put a star next to your 5 most important intentions/actions for this project. • Share your 5 important ideas with the person next to you. Share your other ideas too. Decide together on just 3-5 things that are more important or you both believe will have the greatest impact (lead to the greatest positive change). <p>Write each of those 3-5 ideas on a half sheet card. Go around the table and take turns sharing your ideas and putting them on your group tree.</p> <p>Once your tree is constructed, as a group talk about what you notice and what stands out to you. Decide together what everyone is committed to doing, producing, creating, or accomplishing. Write a star on those cards.</p> <p>Check back in with the large group. Have each group share their tree and the key components of their vision tree. Check to see if there are any last closing thoughts, comments, or questions.</p> <p>Thank everyone for their time!</p>

FACILITATION PLANNING (VIRTUAL ADAPTATION)



PREPARATION

The prep for this virtual activity will look a little different than that of the in-person facilitation. You may choose to do this as a whole group or break into smaller teams if there are areas with different goals. While there will be no prep of physical materials, things you will need to do beforehand include:

- Create a digital template to work in (you can do this using Microsoft Word, Microsoft PowerPoint, or other software or by creating a space in a web-based platform like Canva or Miro)
- Send out virtual meeting invitation to participants with a web link to the virtual meeting space

Supplies and materials you will need include:

- Virtual meeting platform
 - Digital template
 - Accessibility options (closed captioning, translation, etc.)
 - Notetaker
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WARM-UP

- Orient group to the purpose of the activity
 - Go over group agreements
 - Use metaphor of a tree to 'paint' the visual picture
 - Clouds = Ideal vision
 - Leaves = What is hoped to be created, produced or accomplished
 - Trunk = Collective strengths, assets, and resources
 - Roots = Unique, individual strengths
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CONDUCTING THE ACTIVITY

- Individual brainstorming
 - Type ideas on each virtual 'sticky' note that corresponds with section of the tree you are building
 - Place sticky notes on the Miro board in the appropriate section of the tree
 - Have participants share their ideas with the group
 - Scan for any connections between ideas within the same part of the tree and move them together
 - Repeat until all ideas are up on the board and organized on the tree
 - Ask the group to identify the actions or accomplishments that they are all committed to doing
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WRAP UP

- Reflect as a large group to wrap up activity
 - What stands out
 - Are there any surprises
 - Last thoughts
- Share how the group will get documentation that reflects the work they did together
- Take screenshots of the group's finished work so that you can have a visual to refer to during analysis

FACILITATION PLANNING (VIRTUAL ADAPTATION)

Visioning Tree Activity – Facilitation Plan

Location:	Date:	Time:	# of participants:
Facilitator(s):	Rational Aim: To enable the group to create a shared vision of what they will accomplish with the community and set intentions for what will come.		Experiential Aim: To generate excitement about the possibilities of the organization by imagining the ideal state for their organization and identify strengths and partnerships that can help them achieve the ideal vision.
Room set-up: Virtual Platform (Like Zoom)	Materials: virtual platform for collaboration, Visioning worksheet		Supplies: digital template for Visioning Tree

Visioning Tree Session

Introduction – Planting Our Roots	Creating a Shared Vision	Grow Our Trunk –Collective Strengths	Our Leaves – What We Hope to Create
<p>Hi everyone! We are so excited to be here today and to get to know each other better. [DO INTRODUCTIONS HERE].</p> <p>Everyone in this organization/group brings unique strengths to the world, to your community, and the work that we will do together. When I talk about strengths, I'm talking about your unique knowledge, skills, abilities, talents. I'm also talking about your personal contributions and expertise.</p> <ul style="list-style-type: none"> • First, we are going to brainstorm our personal strengths that will help support our work to make positive change for youth and young adult mental health. • On your own, make a list of your personal strengths on paper. • Consider how each you believe each strength will contribute to making positive change. • Pick your top 3-5 strengths and type them onto the corresponding virtual sticky notes. • Together as a group, take turns sharing your ideas and placing the virtual stickies on your tree - putting them at the root of the tree. 	<p>Visioning is creating a clear, specific, compelling picture of what our communities will look and be like in the future (~5 to 10 years from now). The vision is the ideal picture of how we imagine things will be; it is the picture of our hopes for our communities. Creating a shared vision gives us one direction that we are all moving toward together.</p> <p>a. Describe the tree: Point to the open sky (this is where we want to be as a result of our efforts).</p> <p>b. Close your eyes. Imagine yourself as an Eagle soaring above your communities 10 years from now. [TALK ABOUT FACTORS RELEVANT TO THE ORGANIZATIONS GROWTH/ IDEAL STATE]</p> <p style="padding-left: 40px;">i. What do you see? What do you hear?</p> <p style="padding-left: 40px;">ii. What are people doing?</p> <p style="padding-left: 40px;">iii. How do people interact or treat one another?</p> <p>c. Open your eyes. Each person share one word that describes their vision (round robin).</p> <p>d. Someone share your whole vision with the group. What did you experience?</p> <p>e. Close your eyes and envision your community in three years. Think about a usual day in your home, neighborhood, or organization, three years from now.</p> <p style="padding-left: 40px;">i. What do you see? What do you hear?</p> <p style="padding-left: 40px;">ii. What are people doing?</p> <p style="padding-left: 40px;">iii. How do people interact and treat one another?</p> <p>f. Open your eyes. Write down what you saw and heard on your visioning worksheet.</p> <p>g. Ask people to share parts of their vision, ideas. Each group has a recorder who writes the ideas down above the tree on the paper. Be specific.</p> <p>h. Reflect: What do you notice about your visions? What do they have in common (what holds them together)? What seems truly important to us as a group?</p>	<p>The foundation of your organization is your collective strengths and how well you grow them together.</p> <ul style="list-style-type: none"> • Look at the roots, what do you notice? • Which of the strengths have similar ideas? Similar threads that stick together? • Move sticky notes around to be close to similar ideas. Name the clusters. Write the name of clusters on a half card and put those cards on the wall in the trunk. • What is missing? What other strengths and resources do you have? • Add additional sticky notes as needed to capture the other strengths/resources/assets that exist within your organization and community. 	<p>As a result of combining your strengths you will grow and produce some amazing things together. What will you do? What will you accomplish together?</p> <ul style="list-style-type: none"> • First, brainstorm a list on your own (write down all of your intentions and aspirations for your work within your organization). Put a star next to your 5 most important intentions/actions for this project. • Share your 5 important ideas with the person next to you. Share your other ideas too. Decide together on just 3-5 things that are more important or you both believe will have the greatest impact (lead to the greatest positive change). <p>Write each of those 3-5 ideas on a half sheet card. Go around the table and take turns sharing your ideas and putting them on your group tree.</p> <p>Once your tree is constructed, as a group talk about what you notice and what stands out to you. Decide together what everyone is committed to doing, producing, creating, or accomplishing. Write a star on those cards.</p> <p>Check back in with the large group. Have each group share their tree and the key components of their vision tree. Check to see if there are any last closing thoughts, comments, or questions.</p> <p>Thank everyone for their time!</p>

DATA ANALYSIS



HOW DO WE ANALYZE IT?

For this activity, the responses from all participants can be analyzed using a qualitative analysis method. One or more persons reviews each response and decides how to 'code' or categorize the information according to the meaning or purpose of the response. Once all responses are coded, responses are reviewed collectively to identify the larger ideas or themes that describe the group's collective hopes, visions, and experiences.



WHAT DO WE DO WITH IT?

Take each of the handwritten the root, trunk, leaf, and cloud cards into a spreadsheet that organizes responses into the four categories. You can use a list format or a visual diagram which reviewers then use for coding. If you use polling software, export the raw data to a spreadsheet for analysis. If you are doing this digitally, you can simply create a PDF of your document to share with the group.

OTHER HELPFUL INFORMATION



HOW SHOULD IT BE SHARED?

A polished version of the Visioning Tree can be shared with the participants as an overview of their vision at the onset of the project and as a progress tracker as they start to shift their efforts to be aligned with what they discovered during the activity. This activity can be repeated for each goal that is set and can also be revisited to see where changes have been made or to identify new strengths and actions.



FACILITATION TIPS

1

Make sure to spray the sticky wall ahead of time with spray adhesive so that the cardstock will stick when you place them on it.

2

Walk around while the group is brainstorming to see how much time they need and keep them on track with time.

3

If you're doing this virtually, it's best to present your screen and type for them, rather than having them fill it out.

4

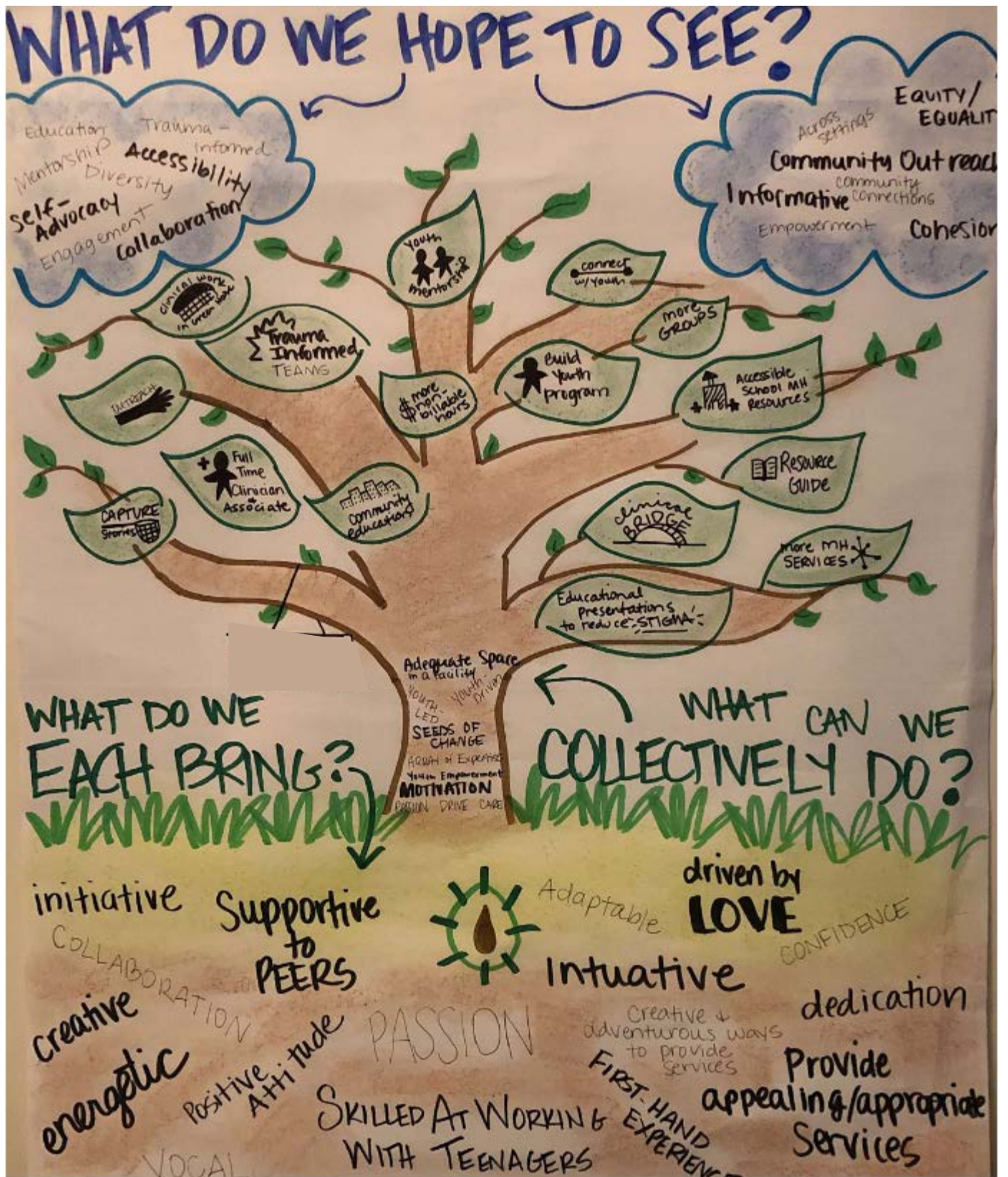
Providing participants with the facilitator instructions for this activity can build capacity for evaluation.



PARTICIPATORY EVALUATION ACTIVITY SOURCE(S)

1. [Community Visioning](#), by NAMATI, 2016
2. [Tree of Vision](#), by At The Well
3. [The Tree of Life](#), by Nathan B. Weller

ACTIVITY TEMPLATE



ACTIVITY TEMPLATE (VIRTUAL ADAPTATION)

MIRO BOARD EXAMPLE TEMPLATE

Visioning Tree

