

# Community Volunteering and National Service Graphic Vision and Strategy Identification Process

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## Toolkit

The Points of Light Foundation • Corporation for National Service - National Service Leadership Institute

### What is the Community Volunteering and National Service Graphic Vision and Strategy Identification Process?



The *Community Volunteering and National Service Graphic Vision and Strategy Identification Process* is a quick and effective way to help your board, staff, or community members identify the specific strategies your organization can take to achieve your mission in alignment with the goals of the larger community volunteering and national service network. Using these instructions, you can stimulate creative thinking, generate good ideas, synthesize content, and create group ownership of a set of strategies to achieve your organizational vision as a part of an overall national effort to fulfill the promise of America for all our people, young and old.

No one should confuse these materials with the process of “strategic planning.” The entire agenda enclosed can be conducted in three hours. True strategic planning involves a much greater investment of time and many more steps than what is included in this Toolkit. However, this process would be an excellent “kick-off” to developing a strategic plan or preparing a board or organization to do strategic planning.

### Purpose

Using the graphic template tool and the attached process agenda you will be able to:

- Develop a compelling vision of the future for your organization/community/project that links to the overall vision of the community volunteering and national service network



### Included in this Toolkit

- Sample Graphic Template Tool
- Sample Facilitator Worksheet
- Steps at a Glance
- Materials and Supplies List
- Set Up and Preparation Instructions
- Role of the Facilitator
- Sample Process Agendas
- Detailed Instructions
- Discussion Tip Sheet
- Resource Guide

- Stimulate individual thinking and generate good ideas about how the mission might be achieved
- Synthesize the best thinking of the group to determine the best strategies
- Create connections and build alignment between the various parties/members of the group
- Generate enthusiasm and inspire commitment
- Keep the vision and motivation alive through a graphic image that individuals can identify with and connect to beyond the initial exercise

3. Identify/refine the vision for the future
4. Identify strategies to reach the vision
5. Synthesize and agree on strategies
6. Bring to closure

Time needed: Minimum of 3 hours. *(This process is designed to last three hours. If you have more time available, you may lengthen the discussion time for each individual question. We recommend no more than 6 hours for the process).*

## Overview of the Process

1. Review of the past
2. Identify the challenge(s) of the present

## Materials/Supplies Needed

- Individual graphic templates for each person or one large graphic template wall chart and individual question worksheets (for ordering large graphic template wall charts contact the Points of Light Institute at (202) 729-8209)
- Easel with notepad and masking tape
- VCR and monitor (if showing the *History of Community Volunteering and National Service* video, available to order through the Points of Light Institute) or blank butcher paper taped to wall to tell the “Story of the Past” for your own organization
- Markers, colored pencils, crayons, etc. at the table for use in completing the templates
- Sticky “dots” in different colors
- Post-It™ notes
- Optional: Butcher paper on the wall, magazines, scissors and paste for collage images
- Optional: Facilitator Worksheets for each break out group (see samples attached)



**Related Materials**

***Sample Graphic Template Tool***

Please refer to the Graphic Template included in this packet.

***Sample Facilitator Worksheet “Group Synthesis” (for use with multiple groups)***

Please refer to the following worksheets included in this packet:

Top Ten Sheets

Demographic Information Sheets

## Set-up and Preparation

The process can be used with one group or with a larger group and smaller break-out groups. The ideal number for one group (or one break-out group) is eight; however, groups are effective with no less than five and no more than 12 participants. The process can be used as a 3-hour (or 6-hour) stand-alone session/meeting or can be incorporated as a part of a one- or multi-day meeting or retreat.

- Prepare a list of desired outcomes on a wall chart and post (Purpose statement above)
- Print overall process agenda on a wall chart and post (see below)
- **If one group:** Arrange rectangular tables in a “U” shape with chairs on the outside. The open part of the “U” should face a flat wall with the posted wall charts.

**If large group with break-outs:** Use round tables with 5-10 chairs placed with enough distance between to allow for uninterrupted conversation at each table. Place a Facilitator Worksheet and some different-colored sticky dots and notes on each table.

Post wall charts on an accessible flat wall with good visibility from the tables.

- **If using large graphic template:** Tape to a flat wall. **If creating a collage out of the elements of the vision:** Tape blank butcher paper to a wall and write “*Create a vision for the future where community volunteering and national service connect Americans to solve serious social problems and fulfill the promise of America for all our people, young and old*” at the top.
- **If using individual graphic templates:** Reproduce one for each participant and place in front of a chair (recommended for use with more than one group). **If using question worksheets:** Type questions, leave spaces for multiple responses under each, and reproduce for each participant (this is best when working with a single group).
- **If showing a video:** Set up VCR and monitor next to the easel or wall charts. Cue video and make sure it is ready to go with the push of a button. **If telling your own organization’s “Story of the Past”:** Tape 3’ x 8’ blank butcher paper to a flat wall.

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## Facilitator Roles



### One group

- Your role is to introduce the process including the purpose, desired outcomes, and the steps on the agenda. It will help to provide a context for why this process is being used (why a vision/strategic planning session and why now).
- If you, as facilitator, are not the sponsor of the session, you will want to ask the sponsor to provide this context for the group. This will also set the stage for exploring the past. Next, introduce the tools provided to help the group achieve the outcomes. Once all of this background information is communicated, you can charge the group to get down to work.
- For most people, it is cognitively easier to think about the future after re-visiting the values and traditions of the past. As facilitator you can help the group do that by showing the video *History of Community Volunteering and National Service* (available to order through the Points of Light Institute) prior to asking participants to complete the graphic template or question worksheet. Or, if you prefer to personalize the process to the specific history and values associated with your organization, you can conduct a quick exercise (“Story of the Past”) to identify past key events and milestones.
- Once the video or exercise is over, help prepare participants for the task ahead by generating a list of “challenges of the present.” Hopefully the opening words of the sponsor will have already stimulated the thinking of participants in this direction.
- After participants have completed their individual work, your primary role is then to

facilitate—encourage participation, record all ideas, use tools to focus the group’s thinking, and manage the process.

- Encourage participants to share their responses to question #1 and post on an easel or blank wall charts (select a recorder/scribe if you like). Once all participants have exhausted their ideas, facilitate the narrowing of the list to the “key themes” for question #1 (see “Discussion Tip Sheet” for tools on how to do this). Use the same process for question #2.
- When the key themes for questions #1 and #2 are agreed upon, encourage the group to use their creativity by either: a) drawing images on the large graphic template that correspond to the themes, or b) using magazines and cutting and pasting pictures or word images from the magazines that correspond to the key themes. This is your graphic image of the vision.
- Generate the list of ideas in response to question #3, narrow the list, agree on the strategies, and encourage the group to identify next steps. Close the session by debriefing participants’ experiences using the process and commitment to the vision and strategies.

### Multiple small groups

- If you are working with several groups of 5-10 people, your role is to serve as the overall facilitator who manages the small group process. The initial steps are the same as above, but once the instructions are given, the small groups are self-facilitated at each table using the Facilitator Worksheets.
- Oversee the work of the small groups, then consolidate the key themes or theme from each group into the one list that all participants can agree to support. It is recommended that you use the individual graphic

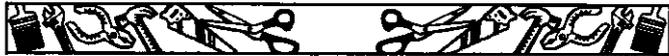
template tools so that individuals will come up with the one best response rather than worksheets, which encourage each participant to generate several ideas in response to each question.

<b>Sample Process Agenda for One Group</b>	
Welcome	15 minutes
Purpose of session (sponsor)	5 minutes
Overview of process, purpose, outcomes, agenda	15 minutes
Story of the past/challenges of the present	15 minutes
Individual reflection on three questions	5 minutes
Group brainstorm/discussion on question #1	20 minutes
Group brainstorm/discussion on question #2	20 minutes
Create the vision of the future	15 minutes
Break	15 minutes
Present the vision	5 minutes
Group brainstorm/discussion on question #3	15 minutes
Agree on key strategies to achieve the vision	15 minutes
Next steps	10 minutes
Debriefing/closure	10 minutes
<b>TOTAL</b>	<b>3 hours</b>

<b>Sample Agenda for Multiple Small Groups</b>	
Welcome	15 minutes
Purpose of session (sponsor)	5 minutes
Overview of process, purpose, outcomes, agenda	15 minutes
Story of the past/challenges of the present	15 minutes
Individual reflection on three questions	5 minutes
<b>Small Group Work</b>	
Groups brainstorm/discussion on question #1	15 minutes
Groups brainstorm/discussion on question #2	15 minutes
Large Group presentation and agreement on list	10 minutes
Create the vision of the future	15 minutes
Break	15 minutes
Present the vision	5 minutes
<b>Small Group Work</b>	
Groups brainstorm/discussion on question #3	15 minutes
Agree on key strategies to achieve the vision	15 minutes
Next steps	10 minutes
Debriefing/closure	10 minutes
<b>TOTAL</b>	<b>3 hours</b>

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## Detailed Instructions



### I. Welcome (5-15 minutes)

Note: The welcome may not be necessary if this process is part of a longer meeting or retreat.

1. Welcome everyone and introduce yourself (or if you are not the sponsor/leader of the group/meeting, have the appropriate individual do this and then introduce you). If introductions are necessary, make sure they are accomplished along with a quick “get to know you” activity to set a collaborative tone.
2. Ask everyone to share one reason why they came to this session or one expectation for the meeting. If your group has 5-12 participants, record each person’s expectation on pad and post it on the wall. If yours is a larger group, ask for a few individuals to share their reasons or expectations and post.

### II. Purpose of the session (5 minutes)

1. There should be a compelling reason for bringing everyone together to go through this process. Explain why this process was selected to conduct with this group, at this time (or if you are not the sponsor/leader of the group/meeting, ask the appropriate individual to provide this context).
2. Thank the group for being present and for their willingness to participate. This should set the tone for the process and stimulate the future thinking when participants are asked to identify “the challenges of the present.”

### III. Overview of process, purpose, outcomes, and agenda (15 minutes)

1. Introduce the process by reviewing the “Overview” provided in this toolkit.
2. Re-emphasize the purpose as previously stated by the sponsor.
3. Explain that the completion of the process should achieve the “Desired Outcomes” and review (these should have been posted on a wall chart in advance).
4. Explain that the prepared agenda (should be posted on the wall) should help us to complete the process in the time allotted and achieve the desired outcomes. Review the agenda and times.
5. At this point, if the group does not have established guidelines/procedures for expected behaviors at meetings, the facilitator may need to establish ground rules and define roles.
6. Explain that the only way to complete the agenda within the timeframe projected is for everyone to be clear about roles and expectations throughout the process.
7. Explain your role as facilitator (manage the overall process, encourage participation, facilitate consolidation of ideas) and the role of the participants (actively participate, provide ideas, ask questions, help the group focus). You may also want to assign time-keepers and scribes or recorders.
8. Ask the group if there are any expectations that they would like to make explicit in terms of the behavior of participants. List them on a pad and post them on the wall for referral throughout the process.

#### **IV. Story of the past/challenges of the present (15 minutes)**

##### **A. Story of the past:**

*If using the video (video is 8 minutes long):*

1. Introduce the video (make sure it is cued up and ready to go with the push of a button) by explaining the importance of understanding where you have been before figuring out where you want to go. The video *History of Community Volunteering and National Service* provides a snapshot of the history of our nation's global community volunteering and national service network. This provides a context for examining your own organization's or community's mission and values.
2. When the video is finished, ask:
  - Why was your organization founded in the first place?
  - What was the original need your organization was created to fulfill?
  - What are the key themes and values associated with your organization's past as exemplified by those in the video?
3. List the responses on a blank chart and post it on the wall.

*If using the "Story of the Past" exercise:*

1. Point to the 3' x 8' blank wall chart and explain that it is a blank "storyboard" for a video on the history of your organization. Tell them that they are about to outline the script for a video documentary that will tell the organization's story to the world.

2. Write "History of ... (the name of the organization or community)" at the top of the 3' x 8' wall chart.
3. Then write the date of the organization's founding at the upper left-hand corner and the word "present" in the upper right-hand corner.
4. It is their job to come up with the key people, events, and milestones that personify the values and themes important throughout the organization's history and place them on a timeline. The left-hand side of the chart will represent the early events, people, and milestones, and the right-hand side will represent the more recent ones.
5. Pass out several Post-It™ notes to each person (or if using multiple groups, have these pre-placed on the tables) and ask them to write down a key person, event, or milestone in big letters using a marker and place on the timeline. Give them a minute or two to do this.
6. After everyone has placed their Post-It™ notes on the 3' x 8' wall-chart at the appropriate intervals on the timeline, quickly read them aloud to the group
7. Ask for a volunteer to come up and write in the appropriate years between the founding date and the present that correspond to the people, events, and milestones on the chart.
8. Ask the group to call out the key values and themes personified by the people, events, and milestones. List the values and themes on the blank chart and post it to the wall.

### **B. Challenge(s) of the present:**

1. Ask participants to think back to the reason why they are gathered together as articulated at the beginning of the session. Ask, “What is/are the particular challenge(s) we are currently facing?”
2. Ask participants to call out their responses. List them on the blank chart and post it to the wall.

### **V. Individual reflection on three questions (5 minutes)**

1. Tell participants that it is now time to get down to work. Pass out the blank graphic templates or question worksheets. Ask them to take some time individually to reflect on each question and respond. Remind them that they only have five minutes to complete the questions. Assure them that it is okay to go with their “gut” responses.
2. Give participants a one-minute warning before calling the five-minute time.

### **VI. Group brainstorm/discussion on question #1 (20 minutes)**

*What is the one element from the past that you want to carry forward to sustain great work in the future?*

#### **A. With one group**

1. Encourage participants to share their responses to question #1. Go around the room and have them call out as you (or your recorder) post responses on the chart.
2. If you want to give participants the opportunity to generate more than one individual response to the question, develop a Question Worksheet instead of using the graphic template and alter the question as follows:

“What are the elements from the past that you want to carry forward to sustain great work in the future?”

3. Encourage participants to share their responses to question #1. Go around the room and have them call out as you (or your recorder) post their responses on a chart. Once all participants have exhausted their responses you can narrow the list to the “key themes” for question #1.
4. Once all participants have exhausted their responses, you can either narrow the list of responses or let all ideas stand (it should not be a problem to accept 12 ideas or fewer).
5. For question #1, it is not critical to narrow the list because you are using this question to do some reflection prior to the real work—thinking about the future. However, if you decide that you do want to narrow the list, see the section “Discussion Tip Sheet” for some suggested approaches.

#### **B. With multiple groups**

1. Individuals should use the templates and identify “the one” element from the past.
2. Instruct the participants to share their responses to question #1 at their table. Suggest that they choose a facilitator (you can also pre-determine and train facilitators for small break-out groups), recorder and time-keeper to ensure the sharing and discussion is completed within the 15 minutes allotted.
3. Have the recorder copy the responses onto the Facilitator Worksheet.
4. Have the facilitator narrow the list to “the one” item that the table wants to submit to the larger group. If the table simply cannot

narrow down to “the one,” let them submit their top two, or at the most three.

5. Ask each table to share their submission. Record submissions on a notepad and post them.
6. Assuming that you have fewer than 12 tables, ask if anyone objects to these items as the “key elements” from the past that your group wants to carry forward to sustain great work in the future.
7. If all agree, go to question #2.

**C. If you have an extremely large group involving more than 12 small groups**

Contact Chris Bui at 5th Medium Interactive Communications (see attached Resource Guide) for information regarding interactive technology to support the synthesis and ranking of multiple ideas into a list of manageable themes/strategies. See the related materials included in this packet, “Top Ten Sheets” and “Demographic Information Sheets” for use in collecting data from a large number of people.

**VII. Group brainstorm/discussion on question #2 (20 minutes)**

*What is the one thing you would like to see in the future that is different than the way things are today?*

1. Go through the same process as with question #1 for One Group and for Multiple Groups.

Again, if you want to give participants an opportunity to identify more than one thing they would like to see different, create a Question Worksheet and change the question to: “What things would you like to see in the future that are different than the way things are today?”



**Discussion Tip Sheet**

The following are tips for effective facilitation of this dialogue process.

1. “Why don’t we just go around the table and everyone share their response or best response ...”
2. If you don’t understand the idea given by a participant or it is long and rambling, ask, “Could you say a little bit more about what you mean by that.” Then summarize back and ask if that captures their thought.
3. Read responses back to the participants. Ask if anyone needs any clarification on any of the responses.
4. Write down the ideas/responses shared by each participant on a chart and post it.

*To combine and synthesize ideas:*

1. Ask, “What common elements do you see running throughout these ideas?” It may be possible to synthesize or combine several.
2. Ask, “If we could come up with a few phrases that capture some of the best ideas that were articulated, what might they be?” Then repeat the phrases yourself and ask, “Would anyone object to \_\_\_\_\_ as our best ideas that we want to carry forward?”

*Continued*

2. You may or may not want to narrow the list to key themes (it would depend on how many ideas were generated). Regardless of the number of ideas generated, you will, at a minimum, want to ask if anyone objects to anything on the list. The list is the group's refinement of the vision; it is important for everyone to feel like they can support the vision.

## VIII. Create the vision of the future (15 minutes)

*If using the large graphic template:*

1. Point to the large graphic template taped to the wall (if you are using one). Instruct participants to use colored markers to highlight the key elements from the past that they want to carry forward.
2. While some of the group is highlighting key elements, have others plan to draw images of the key things that they would like to see different in the future. Do so by putting their ideas for pictures, words, and phrases on sticky notes and positioning them on the template.
3. As a group, see what everyone proposes and make decisions.

*If you are creating a collage out of the elements of the vision:*

1. Point to the blank 4' x 6' chart on the wall. Tell participants that they are going to create a visual image of how they see the future.
2. Suggest that they use the first five minutes to plan what they want to do (they can use the same process with sticky notes outlined above).
3. Using the key elements from the past that they want to carry forward and the key things



### Discussion Tip Sheet *continued*

3. Or ask, "Are there any ideas that particularly capture the passion of the group?"

*The forced-choice approach:*

If there seems to be a list of distinctly separate ideas that do not lend themselves to synthesis or combination try the following:

1. You will have colored sticky dots on the table. Ask each participant to take three sticky dots.
2. Pass around your facilitator worksheet and ask them to place a dot on each of the three ideas that they like the best. See where the *energy* in the group is. That will narrow the list.
3. Look for the response with the most dots. Ask, "Since \_\_\_\_\_ received the highest number of dots, would anyone object to this being our table submission?"

*For question #3:*

1. Make sure that the responses are stated as strategies/action items. If not, ask, "How can we turn these phrases into strategic initiatives?" If they say "empowerment," try to get them to give you a strategy that gets you there: "How do we create empowerment?" "What's the strategy?"
2. Use the same suggested tactics as above to narrow the list to a number that is actually achievable and all can support.

that they would like to see different in the future, construct the vision using the markers, pictures cut out of magazines, words, symbols, and sketches.

4. Challenge them to create a piece of art worthy of framing in the lobby at their organization that would give someone an “instant snapshot” of what their organization seeks to achieve in the future.

The break comes at the end of this 15 minutes of creative work. If some members are still drawing when the break comes, they may choose to work for part of the break.

### **IX. Present the vision (5 minutes)**

When participants return from the break, ask if there is a volunteer or volunteers willing to present the vision (the graphic template or collage) to the group.

Prompt them by asking:

- What images or symbols are present?
- Why did you select these images?
- What do they represent in the vision?
- Does this give you a visual snapshot of what the group hopes to achieve in the future?
- How does your vision correspond to the overall vision of connecting Americans to solve serious social problems and fulfilling the promise of America for all our people, young and old?

### **X. Group brainstorm/discussion on question #3 (15 minutes)**

*What are the critical common strategies we need to achieve the vision?*

1. Go through the same process as with question #1 for One Group and for Multiple Groups.
2. For question #3, make sure that the responses are stated as strategies/action items.

### **XI. Agree on key strategies to achieve the vision (15 minutes)**

For question #3, you definitely need to make sure that the list of ideas does not exceed the number of key strategies participants believe they can commit to pursuing in the next few years.

1. You may want to set a 3-5 year timeframe.
2. Use the tactics suggested in the section “Discussion Tip Sheet” to narrow the list to a number that are actually achievable and that everybody can support.
3. You may want to ask participants to rank the combined list of strategies and tally the results to provide leadership with a clear agenda for where to start.

### **XII. Next Steps (10 minutes)**

Facilitate a group brainstorm on what steps they would like to take next in order to continue the work that was started today.

1. Start with a clean blank sheet on the easel.
2. Ask the group to identify those ideas that they can each commit to pursuing.
3. Highlight those items on the list that get full support of the group.
4. Ask them for suggested people and dates due associated with each of the highlighted steps. Write down next to the item.

5. Point to the items on the chart and charge them to pursue their new agenda!

### XIII. Debriefing/Closure (10 minutes)

1. Plan some sort of closing activity allowing participants to reflect on the process and their participation as a group. Ask them:
  - Did you achieve your desired outcomes?
  - Did you behave according to your expectations of each other?
  - Do you feel good about what you accomplished?

- Are you inspired by the vision and committed to pursuing the strategies identified?
2. Ask for feedback on your facilitation of the process. Ask participants:
    - What did you like about the process?
    - What would you suggest we do differently with the process if we were to go through it again?
  3. Thank everyone for their participation.



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### Resource Guide



To order the video *History of Community Volunteering and National Service*, large graphic wall templates, or more facilitator toolkits contact:

The Points of Light Foundation  
Colleen Martins  
1400 I St., NW, Suite 800  
Washington, DC 20005  
(202) 729-8209

For technical assistance in conducting the process or for information about leadership training programs using similar strategic planning and visioning tools contact:

The National Service Leadership Institute  
Michael Mercil or Karen Garland Wray  
Bldg. 386, P.O. Box 29995  
Presidio of San Francisco, CA 94129  
(415) 561-5950 (ext. 121 or 115)

For information about other graphic tools and for consultant services contact:

The Grove International  
P.O. Box 29391  
Presidio of San Francisco, CA 94129  
(415) 561-2500

What Box?  
Strategic and Cultural Communications  
Gordon Rudow  
510 B Simonds Loop  
Presidio of San Francisco, CA 94129

For information about technology to support large groups in conducting this process (using computerized voting on key themes, etc.), contact:

Chris Bui  
5<sup>th</sup> Medium Interactive Communications  
530 B Simonds Loop  
Presidio of San Francisco, CA 94129