

## CHAPTER 2

### *THE VISION CONFERENCE*

*Empowerment is to learn collectively to perceive social, political, and economic contradictions, and to take action against the oppressive elements of reality.*

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## 1. Introduction

“Dreams, not desperation make communities survive”. This slogan was written on a wall of a shantytown in the outskirts of Lima, a community that has developed from nothing to become a well-functioning town. Visions, collaboration and hard work have been the factors that have transformed a desert into a well-developed town. To create dreams about the future is an important task for many groups of individuals and organisations both in grass root activities, public institutions and small businesses. To create visions is the ability to think about the future with great imagination and wisdom.

The main purpose of this chapter is to present the principles of The Vision Conference: a one-day workshop designed for a large group of participants with the purpose of creating ideas and visions for the future about a specific theme (Vidal, 2004a). Complex situations might demand a longer duration, from 2 to 4 days. The format of The Vision Conference has been constructed based on some concepts and experiences from three areas: the organisation of Future Workshops (Jungk and Müller, 1987), group facilitation (Heron, 1999) and creative problem solving (Courger, 1995). The design and planning of a *Vision Conference* are shortly discussed in Section 2.

In Section 3, the various ideas and concepts discussed in the previous section are illustrated by presenting a real life case study: a *Vision Conference* organised by a development centre in a vulnerable region in Denmark. This was a one-day conference designed for 30 individuals and the author of this book was the main facilitator assisted by three other facilitators.

A main task of the facilitators is the organising of *The Vision Conference*. This work starts before the conference day tackling different design and planning tasks. After the conference, the facilitators have to report back and evaluate the whole experience. In Section 4, we discuss in an extensive and general form the design and planning aspects of the organisation of conferences and workshops. Workshops are conferences where the number of participants is reduced (10-12 persons). The management of such conferences or workshops will be discussed in the next chapter.

Other types of conferences and workshops have been developed and used in different contexts and countries; in Section 5 the best known approaches are outlined: *The Future Workshop*, *Scenario Workshop*, *Consensus Conference*, *Future Search*, and *Search Conference*. Finally, in Section 6 some further remarks are presented outlining other applications of *The Vision Conference*.

## 2. The Vision Conference

Vision Conferences can be conducted for a wide range of purposes. A typical purpose is to help organisations and group of individuals to create visions about the future. These visions will then be used as input to the process of strategy development. Similarly, a *Vision Conference* can be suitable for involving diverse groups affected by imminent developments in the larger systems, which include many actors such as industries, regions and communities. We have used the concept of a *Vision Conference* to support grass root innovators and organisations in relation to the task of creation of new ideas for

community work. *The Vision Conference* ideally brings together 30-60 participants representing all relevant actors. The participants must adequately and accurately reflect the groups' range of interests, but participation must be voluntary. Most of the issues discussed in this book are applicable to both conferences and workshops.

### **Purpose**

The purpose of *The Vision Conference* is not only to create ideas and visions about the future but ideas and visions that are suitable as a basis for the process of strategy development to be carried out by the organisation in question. *The Vision Conference* is both a learning and creative experience characterised by:

- The organisation learns about the different actors' ideas, wishes and visions,
- The different actors communicate to each other their visions,
- The participants learn to work creatively, collectively, and purposefully in a large group, and
- The participants learn how to design and manage Vision Conferences.

### **Design and Planning**

Achieving such learning outcomes depends very much on how *The Vision Conference* is designed and managed. Two critical dimensions of *Vision Conference* design are: the definition of the conference *task (content)* and the *social organisation (context) and management (leadership)* of the group. Initial definition of the task and the stages towards its completion is the responsibility of the facilitators (design-managers) of *The Vision Conference*. In consultation with the organisation responsible for *The Vision Conference* and through some prior research into the relevant issues, facilitators should first:

- Develop a tentative definition of purpose that will be meaningful to participants, and
- Suggest a program that provides both adequate direction and sufficient scope for the participants to assume control and responsibility as the conference progresses.

With their experience and knowledge, the facilitators can remain alert to possible drifts into maladaptive directions during the stages towards task completion. However, they do not claim such expertise as would make participants subordinate and passively dependent upon them. The primary purpose is to create the space and the opportunities for the participants to be positive and creative, producing their visions for the future. This is possible only if both the information and ideas come from all the participants and if the group work is organised so that progress towards task completion is accepted as the participants' as well as the facilitators' responsibility.

### **The Conference**

The conference task and program usually take the form of some themes that the participants accept responsibility for answering in collaboration with each other while going through a creative process. The participants will usually be divided in sub-groups, each sub-group being of 7-12 persons and having a facilitator (workshops). These sub-groups will be facilitated to create ideas, visions, and objectives for the above-mentioned themes. Some creativity techniques will be used to support the creative process in each

sub-group. Plenums are planned to communicate the results achieved in each workshop to the participants of the other workshops, see Figure 1.

*The Vision Conference* is usually of one-working day duration. In the morning, work in sub-groups will be combined with plenary sessions with the purpose of producing as many ideas, projects, visions and objectives as possible. This is called *the divergent phase* of the conference. In the afternoon, the same combination of work in sub-groups and plenary session will be carried out, but now the work will be focused in those most promising ideas, those selected by each sub-group. This is called *the convergent phase* of the conference. Sometimes, it could be a good idea to redesign the sub-groups in the afternoon; this might be a crucial decision and should be discussed by all the participants and the facilitators.

It is not unusual to start the whole conference with an invited speaker to give the first kick-off and some inspiration to all the participants. This person should be selected based on his/her experiences with the theme of the conference and his/her ability to communicate his/her knowledge to a large audience. It is a good idea to end the conference with a short presentation by one of the facilitators to summarise the results achieved and with a final talk given by one of the representatives of the organisation organising *The Vision Conference* to outline what is going to happen in the near future.

### **Outcomes**

After the conference ends, the facilitators prepare a report which is sent to all participants and the board of the organisation in question. This report contains:

- The complete ideas, projects, visions and objectives produced by each sub-group in both the divergent and convergent phases of the conference (the results), and
- An evaluation of the different processes and activities carried out at the conference (the learning process and group dynamics).

It is expected that the board of the organisation in question will use the reported information as input to the process of developing strategies and actions plans for their future activities. It often happens that the participants constitute a network capable in its own right of taking further initiatives and organising other vision conferences with other organisations (learning and empowerment).

The overall purpose of the conference and the proposed stages towards its completion should be presented to participants at the outset. *The Vision Conference* is a task-oriented event. Unless participants can see at each stage in the context of making progress with meaningful tasks, they are likely to become confused, uncomfortable, and impatient with the broad scope and freedom provided. Also, this is an opportunity to test with the participants the relevance and validity of the proposed conference design. The invitation and introduction to the conference should emphasise the need for participants to accept “ownership” of and responsibility for the conference proceedings and outcomes.

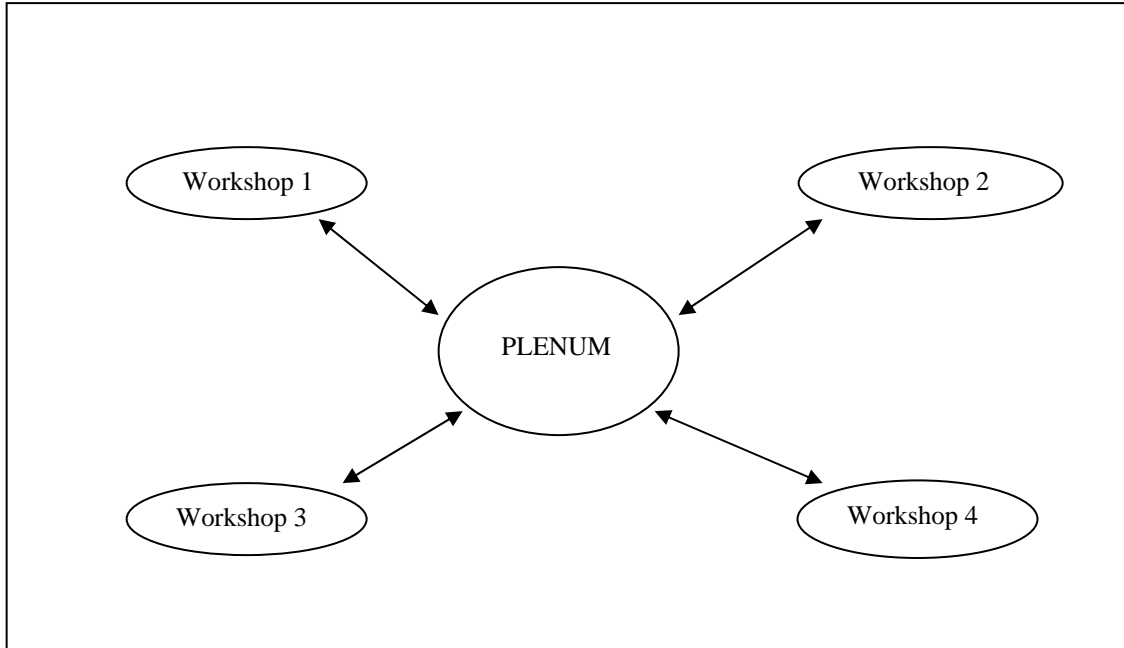


Figure 1. Communication flow in the conference

### 3. Case Study

The Development Centre in Odsherred, North West Zealand, Denmark, is an autonomous non-profit organisation established in March 1998. The main objectives of DCO are to strengthen, develop, and inspire all types of cultural, social, environmental, and commercial activities in the vulnerable region of Odsherred and to create co-operation with similar activities in other similar regions both in Denmark and Europe. Since its establishment DCO has focused on cultural, IT and environmental projects and activities such as: visual arts, Internet communication, dramatised cultural communication, sustainable building and design, etc. Local innovators in close co-operation carry out projects with the relevant actors of the region. This centre is financed through a mix of financing sources: public funds, private funds, sponsors, and business activities. DCO is steered by a board having a wide register of activities within development work, job-creation, education, production, sales, marketing and communication. In 1999, there were so many projects at the centre that 15 persons were employed full-time at DCO. The director of this centre has experiences in fund-raising and in supporting several types of cultural activities in the region. The director of DCO asked the author to organise a one-day Vision Conference in March 2002. This conference was the start of the LEADER+ Program in the region.

#### LEADER+

LEADER+ is an EU-program that supports development in particularly vulnerable rural regions of the European countries members of EU. It supports creative and innovative projects that can contribute to long-term and sustainable development in these regions. LEADER+ Program is one of the EU's structural founding programs that is planned to

run until the year 2006. A four-year program of 48 million DKr. will be administrated by the DCO, to support grass roots innovation, more information can be found in:

[http://europa.eu.int/comm/agriculture/rur/leaderplus/index\\_en.htm](http://europa.eu.int/comm/agriculture/rur/leaderplus/index_en.htm)

The LEADER+ Program is based on the idea of a total and integrated development of a vulnerable region based on a serious analysis of the region's possibilities and limitations. This program aims - using innovative development strategies and action plans - to push the region forward based on the so-called "*bottom-up*" principle. That is, ideas and projects to be supported must be born in the local communities of the region where local organisations, local firms, innovators, fiery souls, consultants, etc. go through a creative process to identify the best qualified projects for the region. In few words, LEADER+ supports grass roots innovation. This means that the projects have to be deeply rooted in the local communities and a special committee will make the allocation of the resources, where the relevant actors will be represented. Twelve areas in Denmark were selected to receive support from LEADER+ program, with one of them being the Odsherred region.

In the application for funds from the LEADER+ Program, DCO emphasised that the projects selected should support the social and cultural capital of the region and create sustainable activities, firms and workplaces. The overall theme was: *Improvement of life quality*. In addition it is specified that support and founding will be given to projects that satisfy the following requirements:

- Are knowledge and technology based so that the local products will be both more competitive and environmentally friendly,
- Will take initiatives to facilitate access to new markets for small industries, and
- Will carry out cultural and artistic activities endeavoured to shape the image of the region.

### ***The Vision Conference***

As mentioned above, it was decided to begin the LEADER+ Program as a *Vision Conference*, to be organised by the director of DCO and the author of this paper as the main facilitator. The objective of the conference was both:

- To create a discussion forum for the different actors around the program to develop common images of ideas, projects, visions and objectives for the program, and
- To observe a *Vision Conference* in action and to study the development of the facilitation process; these experiences and approaches will be used in the future during other implementations of the program.

The theme of the conference was: *Vividly local communities* - Visions, ideas and goals for LEADER+ program in the region. *The Vision Conference* was carried out at the facilities of the Odsherreds Theatre Centre, a nice place where all the needed facilities were available. The director of DCO and the facilitators (the author and three of his students) met twice to design the conference. Two important tasks were dealt with:

- The content and goals of the conference, and
- The many practicalities related to time schedules, speakers, materials, meals, soft drinks, and other facilities that ought to be available.

The conference started 9 a.m. and ended at 4 p.m., one-hour lunch was planned in the middle of the day (see Box 1). The conference started with a presentation entitled: LEADER+ as a tool for local development. The speaker was the director of the LEADER program in Småland, Sweden. This person has a lot of experience about the possibilities and limitations of such a program in connection with community development. The intention was that this talk should give inspiration and ideas for the future creative work based on the Swedish experiences.

9.00- 10.00	Welcome by the chairman of LEADER+ West Sealand and talk: LEADER as a local development tool by Jan Johansson, Sweden.
10.00-10.15	Coffee break
10.15-11.45	Generation of ideas (divergent phase) in 4 workshops each with a facilitator
11.45-12.00	Pause
12.00-12.30	Plenum: presentation of visions and ideas
12.30-13.30	Lunch
13.30-14.45	Adaptation of ideas (convergent phase) in 4 workshops
14.45-15.00	Coffee break
15.00-15.30	Plenum: presentation of results
15.30-16.00	Conclusions with the representants of LEADER+ and the facilitator

Box 1. The program of the conference

After the main talk, the participants were split up in four sub-groups each having a facilitator. The theme for the group work was: Idea generation - suggests as many projects as possible that should be supported by LEADER+. Brainstorming was used as a technique and its four central rules were used intensively: no criticism, freewheeling, spontaneity and it is permitted to combine others ideas. This was the diverging process. After one hour of brainstorming the sub-groups met at a plenary session where all the ideas produced were outlined.

During the afternoon the same sub-groups started the work, but this time the theme was: *Idea adaptation*- select some few projects from the list generated in the morning and work further to design an application to get support from LEADER+. This was the converging phase. This was an exercise in project design and planning. After one-hour of work the sub-groups met at a plenary session to report about the selected projects. At the

end, one representative of the board of DCO gave a summary of the general results achieved and the work to be done by DCO in the near future. Finally, the facilitator gave a short outline of how the conference went forward as a learning process, and the good and bad experiences of the whole conference were discussed.

### **Outcomes**

Two weeks later, the facilitator presented to DCO his report from *The Vision Conference*. This report contained: the background for the conference, the planned schedule, the actual schedule, the concrete results of the work of each sub-group and its evaluation by each facilitator, the final evaluation of the whole experience and some conclusions (Vidal, 2002).

The conference went ahead as planned, a small delay at the beginning and some waiting time due to the fact that the sub-groups did not end their work at the same time cause some disturbances but these things did not affect the main group work. The invited speaker was brilliant, gave a lot of inspiration, and he gave many examples of simple projects that had been implemented with success in Sweden. He emphasised the importance of supporting small industries, and the necessity of having strategies for marketing and communication.

The reports of each sub-group show that their creative processes were quite different, this is probably due to different participants and different facilitators. In spite of that, many projects were suggested in the morning by each sub-group, on average 25 projects pr. group. It was not a problem while diverging but the wild ideas were missing. In the afternoon, all the sub-groups wanted to continue diverging and had difficulty selecting one or two projects for elaborating as an application. The plenary sessions went very well, very amusing, each sub-group very engaged in their ideas and projects, it reflected a good atmosphere and it was a lot of laughter, a good sign of creative work.

There were many projects within art and culture, and ecology and tourism. However, innovative projects within small industries and IT were missing. This shows the necessity of marketing the LEADER+ program in the sector of small industries and IT. The difficulties in elaborating concrete applications by the different groups show the need for DOC to give support and advice to potential innovators in relation to formulating applications.

In summary, the facilitator concluded in the final report that “*The Vision Conference* had been a positive experience. All the participants and the facilitators learned something. This conference was a big communication event where ideas, wishes, dreams, visions, strategies, plans, and objectives interacted with each other and got closer to each other in a constructive way” (Vidal, 2002).

### **4. Design and Planning**

Running a conference involves two complementary roles: design and planning, and facilitating. The first role involves guiding the participants through a series of events and activities during the allotted time, and ensuring that the conference has a beginning,



middle, and end that fit together as a coherent experience. The facilitating role involves using skills and behaviours to promote collaborative problem solving. In short, design and planning focus in the “building” of the conference, whereas facilitating is more concerned with the management of social processes. As a conference presenter, you are both director and facilitator at the same time. The design and planning role are addressed in this chapter and the facilitating role is explored in the next chapter. Although this conceptual distinction regarding design and planning is made here, in other parts of the book we use the term facilitator to encompass both roles.

Based on the discussions of Sections 2 and 3, it is possible to stipulate that the process of the design of a *Vision Conference* can be divided into three stages: the pre-conference planning, the conference in action, and the post-conference output.

### **Pre-conference**

It is a common belief that detailed planning at the pre-conference stage is essential to ensure that the facilitators help to create a group work at the conference that focuses on the task and that this needs tight organisation. Moreover, it is also argued that this first stage is as important as running the group work at the conference itself because without pre-planning the chances of success will be greatly reduced. On the other hand, it is our experience that too much planning and organisation might kill spontaneity and creativity in the group work. Therefore, a suitable balance should be found, a suitable framework that gives space for the development of the rational and irrational processes, and for adaptive decision-making during the facilitation of the group work.

At this stage, it is of central importance that the facilitators discuss with the organisers of the conference the purpose, the task, the organisation and the management of the group work. Enough time should be allocated to discuss these themes thoroughly so that, at the end of this stage, the organisers of the conference and the facilitators have developed a consensus about the objectives and development of the conference. This goal compatibility is of extreme importance. In addition, the processes, tools and techniques that might be utilised during the conference should be discussed. How will the participants react to them? is a central question to be discussed at this stage.

Another important activity in the pre-conference stage is the collection of relevant information by the facilitators and the dialogue with the organisers of the conference about central topics and their possible outcome during the conference, in other words *visioning* possible processes and creating scenarios of possible outputs. The task should be deeply understood by the facilitators as well as the possible conflict areas. Previous relevant reports from the organisers and reports from similar conferences elsewhere should also be available to the facilitators.

It is also important that the facilitators use some time to outline in detail the agenda and the organisation of the conference itself. Afterwards, these issues should be discussed with the organisers of the conference to achieve consensus.

Even at this preliminary stage, the facilitators should think about the last stage where the conference will be evaluated. An outline of the final report could be elaborated and a

simple *information system* could be designed to be used and filled-up during the next two stages. Some facilitators prefer to use a personal *logbook* from the very beginning to take note of important information, events, conflicts and decisions; such book will be very valuable in the last stage of the conference.

For an experienced facilitator, it is usually sufficient to have two intensive three-hour meetings with the organisers of *The Vision Conference* to go through the pre-conference stage. At the end of this stage a short document should be prepared with the intentions, the task, the agenda, etc. of the conference to be sent to the invited participants together with the invitation letter.

Let us see from a practical viewpoint the many tasks to be carried out during the preparation of a conference or a workshop. Five separate tasks are central in the preparation process (Brooks-Harris and Stock-Ward, 1999):

1. *Collecting preliminary information.* Some key questions at this stage are:

- Who is initiating the conference?
- Who will be attending the conference?
- What are the topic, the title, and the content of the conference?
- Why is the conference being requested?
- When will the conference be offered?
- How long will the conference last?
- Where will the conference take place?
- What arrangements will be made? By whom?

These questions have to be discussed and explored before you decide to present a particular conference to a particular group.

2. *Negotiating an agreement.* Here there are some questions to ask yourself before deciding whether to be a facilitator for a conference:

- Am I the best person to facilitate this conference?
- Do I have enough background knowledge? If not, can I collect it?
- Can I design an effective intervention for this group?
- Are my facilitation skills appropriate for this group?
- Should I involve a co-facilitator?
- Do I have enough time to prepare?
- What are the expectations of the requesters? Of the participants? Of other stakeholders?
- Is the fee or the other incentives satisfactory for you?
- What are the consequences for you of the potential results of this conference?

3. *Determining the needs of participants* The needs of the participants should be determined within the following three areas:

- *Knowledge:* Do all participants have the same background knowledge about the theme to be discussed? Should some material be elaborated? Should some lectures be included in the program of the conference?

- *Attitudes:* Do all participants have the same attitude to the conference? Are there differences? Can you register disagreements and conflicts?
  - *Motivation:* Is the conference voluntary or mandatory? How can I increase motivation? How can I encourage participants to reflect on their own experiences? How do I create group dynamics?
4. *Setting goals and learning objectives.* A very useful way to organise your ideas and prepare for designing and planning a conference is to set goals and objectives. Goals are broad aims or purposes. A crucial question to identify goals is: Why am I facilitating a conference on this topic to this group at this time? Objectives are more specific and measurable methods of realizing goals. Objectives answer the following questions, “How will the goals be met?” and “What is the desired result?” Ideally objectives are:
- *Positive:* “Participants will collaborate in producing innovative ideas”
  - *Realistic:* “The participants will learn to work in groups”
  - *Relevant:* “Participants will learn about innovative ideas in other areas”
  - *Specific:* “We will focus on the following themes: nature, culture, etc.”
  - *Measurable:* “The result of this conference will be presentation of many innovative and usable ideas”
  - *Flexible:* The conference should be designed to permit the bending or change of the objectives during the running of the group work.
5. *Choosing additional resources.* The most important resources in a conference are the facilitator and the participants. Additional resources fall into the following categories:
- Up-Front displays, such as a chalk or marker board, an overhead projector, or a slide projector
  - Written materials, such as handouts, papers, and worksheets
  - Multimedia resources, such as music, videotapes, or computer-generated media
  - Specialised knowledge and experience, such as invited experts, advisers, or specialists
  - Interactive resources, such as games, simulation materials, or interactive computer activities

### **The Conference**

A crucial component of directing conferences is considering the environment you want to create. The environment is all of the physical surroundings, psychological or emotional conditions, and social or cultural influences affecting the growth and development of creative and collaborative problem solving. Five of the most important aspects of creating a positive environment are (Drum and Lawler, 1988):

1. *Physical environment is comfortable*  
The physical environment will influence the atmosphere and interaction patterns that occur within the conference. Physical arrangements communicate information about levels of both authority and formality. At one extreme is an

arrangement that enhances authority and expertise and discourages interaction and collaboration. At the other extreme is an arrangement that communicates equality and encourages interaction and participation. A list of physical environmental conditions is the following: group size, location and size of the rooms, level of authority, level of formality, seating arrangements, opportunity for eye contact/sight lines, need for a writing surface, and need for movable furniture.

2. *Relationships are encouraged*

The participants should have relationships with: other participants, the facilitator, and with the content of the experience. As a facilitator you can choose activities in which participants interact with one another and learn from other participants. A positive relationship between the facilitator and the participants begins when the facilitator takes the time to greet participants and make sure everyone is comfortable at the beginning of the conference.

3. *Communication is multidirectional*

In contrast to traditional settings, communication in a conference is not expected to be unidirectional. Participants should be able to listen and understand as well as express ideas. The facilitator should make sure that there is time for participants to share their ideas and for him to listen to their questions, opinions, and experiences. It is a good idea to build in opportunities for both formal and informal dialogue to occur throughout the conference. Informal dialogue with participants is a way for the facilitator to keep the conference vital and engaging as well as a way to gauge the impact of the conference.

4. *Trust and acceptance are built*

In order for participants to be able to collaborate in a personally relevant manner, they must feel safe and they must be able to trust both the facilitator and the other participants. If the participants do not feel safe in the conference, it is unlikely that they will fully engage in active and interactive activities. The facilitator should create processes of building trust and enhancing his credibility and authenticity. Credibility is similar to expertise but also includes personal presentation and having something to offer the participants. Authenticity includes consistency and congruence, ability to admit errors, and acting as a positive role model.

5. *Encouragement is provided*

Participating in a conference is not easy for all people. Therefore, encouragement must be provided so engagement occurs at a pace that meets the needs of the maximum number of participants. Some methods for providing encouragement are:

- Projecting confidence that change can occur
- Sequencing activities so they proceed from easy to more difficult
- Using the progress of some participants to encourage others
- Attending carefully to the attainable aspects of each participant's goals

- Before anyone can speak a second time, everyone should have the opportunity to speak once.
- All opinions must be considered and respected.
- Be critical in a constructive way.
- Listen, no interrupting each other.
- Only one person may speak at a time.
- It is possible to agree to disagree. Identify conflicts.
- No put-downs, name calling, or personal attacks.
- Mocking is not permitted.

### Box 2. Sample Conference Ground Rules

At the beginning of the conference day, it is important that the facilitators explain to the participants the purpose and the agenda of the conference, before the work in sub-groups begins. Explain that the agenda can be changed if necessary, and that the time schedules must be respected to avoid waiting times when the participants meet for the plenary sessions. We present six different events you can use to start a conference. However, most conferences will not address all six of these components. In a complex conference, it may be important to spend more time introducing the conference with goals and objectives, ground rules, and assumptions as separate concerns. These six events are:

- Facilitator introduction
- Participant introduction
- Goals and objectives
- Clarifying expectations
- Setting ground rules (Box 2)
- Clarifying assumptions

In *The Vision Conference*, some creativity tools will be used in the problem solving process. Other conferences and workshops might use other tools. The tools to be used have been selected from a huge number of well-known techniques. The facilitators should be convinced that the selected tools are the most suitable for the conference, but if during the sessions it is detected that the tools are not supporting adequately the facilitator should be capable of switching to other more appropriate tools. Chapter 5 will discuss this topic in what concerns creative tools and methods (Vidal, 2004c). One thing is crucial: the participants should feel at ease with the facilitator, the process and the techniques used, in this way true participation is ensured. Finally, as we pointed out the facilitators are also the managers of the conference; this will have some implications to be discussed in the next chapter.

Maintaining a coherent conference message is an important behaviour. A central part of the design and planning role is using the theme in a way that helps the conference fit together as a consistent and coherent package. Participants need to see and feel that sense of consistency. Referring back to a consistent theme at times of transition and reforming the theme with punch lines are ways that make the activities fit together as a package and reinforce the most important concepts.

Think about pacing and timing issues. Journeys of any length can be thought of as a series of several steps, the same is true of a conference. As you decide how to pace and time your conference activities, consider which of your goals are most important and allot your time according to these priorities. Make sure that there is enough time for the facilitation processes. However, it is also crucial to think about the impact of other daily, monthly, or annual events on your conference.

At the end of the conference, four activities are central:

- Reviewing content to consolidate the experience
- Planning for the future
- Feedback/Evaluations
- Follow-Up

### **Post-conference**

After the conference, the facilitators have to write an accurate report of the conference/workshop. This report should include the following themes:

- An outline of the background and purpose of *The Vision Conference*,
- The results obtained at each sub-group,
- The evaluation by the facilitator of the work in each sub-group,
- The evaluation of the whole conference by the facilitators, including good and bad experiences, and
- What did we learn from the experience?

The fixed objectives can be used in the evaluation process to see discrepancies between our expectations and the achieved results. The facilitators should try to get some feedback on the conference from the organisers and the participants. This could be done by asking the participants to fill-in a questionnaire that focuses on the learning aspects of the experience. This is of central importance if it is planned to carry out a new conference after some period of time to produce new visions and to learn from the experience.

Measuring your performances is more important in some situations than others. Thus, different conferences call for different methods for evaluating your progress. An evaluation process seeks to determine if a goal has been accomplished. Evaluation can also be used to obtain information needed to help us to improve our performances in the future. The following four questions related to conference evaluations are central (Herman, 1987):

- *Why should you evaluate your conference?* As you begin to plan an evaluation, three questions should be answered:
  1. What is the purpose of the evaluation? Usually, we evaluate to find out how we did it and to find out our mistakes to improve our performance next time. An evaluation can also be a documentation that you are worth your fee.
  2. For whom is the evaluation been conducted? Depending on the context of the conference you are providing, different stakeholders may have an

interest in the results of the evaluation. It is often the case that for conference evaluations the role of evaluators, sponsor, stakeholder, and user are all played by the same people.

3. Who will conduct the evaluation? Before you plan your evaluation, you must decide whether you should design and conduct the evaluation yourself or if you should select an outside evaluator. Although many facilitators conduct their own evaluations, there may be situations there may be situations that call for an outsider who has more expertise or more time and resources to conduct an extensive evaluation.
- *What kind of overall strategies should guide your evaluation?* Before developing a specific evaluation plan, a conference evaluator must make three choices about evaluation strategies:
    1. Will you use a formative or a summative strategy? Formative evaluation demands collecting and sharing information for conference improvement, while summative evaluation looks at the total impact of the conference. The first one occurs in the midst of a conference in order to improve it, while the second one occurs at the end of the conference and measure the outcome. Summative evaluations at the conclusion of a conference are most common because the short-term nature of a conference makes it difficult to collect and use data for formative evaluations.
    2. Will you collect quantitative or qualitative data to evaluate the conference? Quantitative data give precise numerical measures, while qualitative data provide rich descriptive materials. Many facilitators choose to collect both quantitative and qualitative data to take advantage of the strengths of each strategy.
    3. Will you be conducting a formal or an informal evaluation? Informal evaluation depends upon causal observation, implicit goals, intuitive norms, and subjective judgement, while formal evaluation is based on controlled comparisons and objective measures. These three strategies can be combined, not all of them are realistic, and the four most commonly used are shown in Box 3.
  - *What kind of variables should you measure?* Now you have decided your evaluation strategy, the next step is to determine which variables to measure or observe. Most conference evaluations target one of three types of variables: satisfaction, the accomplishment of objectives, or behaviour change.
  - *What are the steps in planning an effective evaluation?* Five sequential steps are recommended to plan an evaluation: Formulating questions and standards, selecting a research design, analyzing information, and reporting information.

*Informal/Qualitative/Formative*

Half-way through a full-day conference, the facilitator asks for verbal feedback and presents choices for how to spend time during the rest of the session.

*Informal/Qualitative/Summative*

At the end of a conference, the facilitator leads a discussion about the activities used, including strengths and weaknesses of each activity. The facilitator takes notes and uses this feedback in designing her next conference on the same topic.

*Formal/Quantitative/Summative*

At the end of the conference, the facilitator distributes an evaluation form that asks the participants to give numerical rankings regarding the accomplishment of each objective.

*Formal/Qualitative/Summative*

At the end of the conference, the facilitator distributes an evaluation form that asks participants to respond to open-ended questions about each of the activities.

Box 3. Four evaluation strategies commonly used for conferences  
(Brooks-Harris and Stock-Ward, 1999)

## 5. Other Conferences/Workshops

Several other types of conferences and workshops can be found in the literature. These have been developed and used in different contexts and countries. Let us mention some of the most popular.

*The Future Workshop* is very much used in North Europe. It was originally developed by Robert Jungk (Jungk and Muller, 1987) for citizen groups with limited resources who wanted influence in the decision making process related to their future life. It is a workshop or conference meant to shed light on a common problematic situation, to generate visions about the future, and to discuss how these visions can be realised. It is usually composed of five phases:

1. Preparation phase (design and planning)
2. Critique phase (critical understanding)
3. Fantasy phase (visions)
4. Implementation phase (actions)
5. Permanent workshop (group work)

The main stages are: Critique, Fantasy, and Implementation. There are many similarities in this workshop to *The Vision Conference*. In *The Vision Conference*, there is not a critique phase; the task is the creation of visions, projects and activities for the future. More details about *The Future Workshop* and its applications will be presented in Chapter 6.



Scenarios Workshops and Consensus Conferences has been developed by The Danish Board of Technology, an independent institution established by the Danish Parliament. A Scenario Workshop starts with a problem looking for solutions; A Consensus Conference focuses on Society's use and regulation of technology. The solutions can be technological, regulatory, or maybe a new way of organising and managing certain problems.

A *Scenario Workshop* is a local meeting that includes dialogue among four local groups of actors: policy-makers, business representatives, experts and citizens. The participants carry out assessments of technological and non-technological solutions to the problems, and develop visions for future solutions and proposals for realising them. Before the workshop can take place, a set of scenarios are outlined by the organisers, describing alternative ways of solving the problem. They have to be different with respect to both technical and organisational solutions presented and the social and political values embedded in them. The workshop process may last for one to two days. This process has three main phases:

1. To comment on and criticise the scenarios by pointing out barriers to realising the visions,
2. To develop the participants' own visions and proposals, and
3. To develop local plans of action.

The process is guided by a facilitator and takes place in 'role' groups, 'theme' groups and plenary sessions. Dialogue among participants with different expertise, values and experiences is essential. Various tools can be used to achieve good dialogue and the production of results in the form of identification of barriers, visions and proposals for action to be taken. Two examples of Scenario Workshops carried out by the Danish Board of Technology are: "Urban Ecology" and "The Library of the Future".

A *Consensus Conference* is a public meeting, which permits ordinary citizens to be involved in the assessment of technology. The conference is a dialogue between experts and citizens. It is open to the public and the media. Usually, it is attended by some members of the Danish Parliament and other politicians. *The citizen panel* plays the leading role, it consist of around fourteen individuals who are introduced to the topic by a facilitator. The citizen panel formulates the questions to be discussed at the conference, and participates in the selection of experts to answer them. The panel has two weekends for this preparation. *The expert panel* is selected in a way that ensures that essential opposing views and professional conflicts can emerge and be discussed at the conference. Suitable experts are not only knowledgeable but also open-minded and good communicators with a broad view of their field. *An advisory/planning committee* has the overall responsibility of making sure that all rules of a democratic, fair and transparent process have been followed.

On the first day of the conference, the experts present their answers to the questions from the citizen panel, from the point of view of their field of expertise. The following morning is reserved for clarifying questions and for discussions between the expert panel, the citizen panel and the audience. The rest of the second day and the third day are

reserved for the citizen panel to produce a final document, presenting their conclusions and recommendations. Consensus on attitudes and recommendations are achieved through open discussion. Thus the final document is an expression of the extent to which the citizen panel can reach consensus. On the morning of the fourth day, the citizen panel presents the final document to the experts and the audience, including the press. The experts have the opportunity to correct misunderstandings and factual errors; at this point they are not allowed to influence the views of the citizen panel. More details about this workshop and this conference can be found in (Andersen and Jæger, 1999).

*Future Search* and the *Search Conference* are large group planning meetings that brings a 'whole system' into the room at one time to work on a task focused agenda. They focus on the future, articulating what it means for each participant present and working out how to influence it. *Future Search* follows a progression of events approach from the past into the future, whereas *Search Conferences* are more concerned with finding the best fit between the system and its environment.

A typical *Future Search* conference lasts 2-3 days with up to 64 persons and uses the following steps:

- *Focus on the past.* Examine a collective past from three perspectives: The individual, the organisation and society. Find patterns, trends and the direction of movement.
- *Map the present in all its messy complexity.* Examine the current events, trends and developments outside the organisation that seem to be shaping the future. Understand the strengths and characteristics of the organisation. Generate list of 'prouds' and 'sorries', the things about which people feel good and bad.
- *Focus on the future.* Developing ideal future (5-20 years) scenarios describing the state of being there, not the process of getting there. Find common ground and develop a shared vision.
- *Reflect, learn and act.* Prepare suggested action lists for oneself, the group, and the whole organisation in order to bring closer the future that has been described.

This conference has been broadly used in the USA. Details about *Future Search* can be found in (Weisbord and Janoff, 2000).

*The Search Conference* brings together from twenty to thirty-five people who work together as a group to develop strategies plans for a system they share. *The Search Conference* has the following content over 2-3 days:

- *Learning about our turbulent environment.* Identifying the changes affecting the future of the system and imagining the probable and desirable global future.
- *Learning about the system.* Developing a picture of the system's functioning and creating a list of what to keep and change.
- *Action planning.* Taking the strategic objectives for the system and developing implementation plans.

This conference has been broadly applied in Australia. Details about *The Search Conference* can be found in (Emery and Purser, 1996).

## 6. Further Remarks

*The Vision Conference* was formatted as a strategy to develop visions in the form of ideas or projects for developing an organisation or a community. The design of the conference task embodies the principles of creative problem solving while the social organisation of the group expresses the principles of facilitation of responsible participative democracy.

*The Vision Conference* is characterised by three main aspects:

1. The focus on group dynamics while other approaches focus on methods or on approaches for task solving as the steering factor,
2. The Vision Conference is based on modern concepts of creativity and the facilitation of creative problem solving processes, and
3. The Vision Conference emphasises collective work and collaborative learning through the interaction of the participants with the aim of learning how to build, sustain, and develop responsible participative communities.

We have learned to design, plan, and evaluate Vision Conferences; the next task is to try to answer the question: What did we learn from this experience? This is the field of the systematisation of praxis. To systematise is to describe, structure, and reflect analytically on the development of a practical experience, see further (Vidal, 1991, 2004b).

Since year 2002, DOC has evolved to LEADER+ West Zealand, an autonomous NGO. This organisation has as its main objective to give support to cultural, social, environmental, industrial, and commercial projects in the region. It is economically financed by EU's development program for vulnerable regions. This organisation has adopted *The Vision Conference* and similar workshops as a main tool in its strategy making work. The author has been facilitator of the following Vision Conferences in West Zealand:

- Odsherred, West Zealand 2025 – A Vision Workshop, April 2001
- LEADER+ West Zealand – A Vision Workshop, March 2002
- National and International Cooperation under LEADER+ Program, November 2003
- Development in West Zealand (2007-2013), August 2005.

In addition, before applying for economical support to a project this organisation recommends that the group of initiators of the project organise a workshop to clarify ideas and visions. The fees of the facilitator will be paid by LEADER+ West Zealand. In the next chapter, we will mention some of these projects where we have been facilitating their workshops.

*The Vision Conference* has been applied to other situations. I have conducted conferences and workshops for small firms, consulting firms, schools and small public institutions. Some of these organisations have adopted this conference as a permanent approach in their strategically work. I have even use this approach to design and planning of a family party with big success. My students have been very creative in finding applications of this form of collective work. Traditional meetings in trade unions, clubs, schools, and other

organisations have been transformed to conferences and workshops following some of the principles outlined in this chapter.

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