TOOL 3
VISIONING

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What is the **purpose** of visioning?

- To identify the overall project goal and the main constraints that need to be overcome to achieve it.

- To serve as a base for the final theory of change outlined in the PDD.

Plan Vivo Carbon Standard (PV Climate) **requirement?**

Recommended - especially for the development of the project's theory of change (required for both the PIN and PDD).

When to use this tool?

- For preparation of PV Climate PIN Section 3 - Table 3.

- During PV Climate PDD preparation especially for Sections 3.1, 3.3, 3.4 and 3.5.

Why is this tool required?

The Visioning Tool is useful for supporting and developing the project's theory of change or logical project framework. The theory of change shows, in a simple way, how the project interventions and activities will contribute to achieving the longer-term goals of the project i.e. it shows the 'logical reasoning' behind the project design. In order to do this, the project goals need to be clearly identified and agreed by all the key stakeholders because PV Climate projects are required to be developed through a participatory (bottom-up) process.

Having identified the goals, suitable interventions and activities can be designed for the project to implement. This Visioning Tool doesn't result in a complete theory of change; however, it does make an important contribution to it by helping to identify the goals of a project along with the main issues or constraints that need to be tackled in order to achieve them - all from the perspective of key stakeholders.

Consequently, the Visioning Tool is usually used at an early stage during the project design. After it has been carried out, the project developers will need to work further with local stakeholders to finalise the theory of change, based on some of the ideas and suggestions coming from this tool.

Who should participate?

Representatives of the main local stakeholder groups should participate during the Visioning Tool, especially those representing disadvantaged or socially excluded groups, to ensure that their particular concerns are raised. This means that the Visioning Tool should be carried out after the Stakeholder Analysis has been completed. As with all these participatory tools, it is best to work with a group of up to 20 people.

How to use the tool?

- [ ] Start by explaining the purpose of Visioning. Explain that this is an opportunity for participants to identify key issues and constraints and design the project in a way that these can be tackled.

- [ ] Divide participants into 2 (possibly more) smaller groups and provide each group with a large sheet of poster paper and drawing tools. Small groups can be selected at random, or can be used to separate different stakeholders e.g. men/women or youth/older people.

- [ ] Ask one group to prepare a poster showing the present situation of their village/community focusing particularly on the natural environment i.e. farming, forest, water resources, soils, livestock, nature-based livelihoods etc. Ask another group to prepare a similar poster showing they would like to see their natural environment at some time (say 20 years) in the future.

- [ ] After about 30 minutes the 2 (or more) posters should be completed. Fix these to a suitable wall (see diagram below). Ask each group to explain to the whole group what they have put on their poster and allow some time for questions and explanations.

- [ ] Then draw a large arrow from the lower poster (present situation) to the higher poster (future vision). Explain that this arrow shows the direction of travel (see diagram).

- [ ] Explain that there are some factors/forces that support this direction of travel i.e. those that push upwards. These are positive forces that will help to reach the future vision and the project can utilise these for its implementation. Then explain that there are other factors/forces that

hinder this direction of travel i.e. they push downwards. These negative forces need to be tackled by the project so that that future vision can be reached (see diagram).

☐ Then divide participants into 2 or more small groups again. Ask one group to write down on flash cards or post-it notes what the positive forces are (those that push upwards) and another group to write the negative forces (those that push downwards). Explain that participants should only write a short phrase or word on each card. For non-literate participants, they can draw a picture that represents the phrase. After about 30 minutes, ask each group to fix their cards onto the diagram (as shown below).

☐ Ask each group to explain the significance and importance of each card they have placed. Ask other participants if they agree. If necessary, move cards (sometimes a negative force can be considered as having a positive effect!) and add any additional cards to the diagram as required.

☐ For each of the negative forces shown, ask participants what interventions or activities should be included in the project to tackle these. Make a note of these points.

☐ Finally, ask one person to explain (summarise) the whole diagram to make sure that everyone has understood and agrees with it. Take a photograph of the completed diagram. If possible, leave the whole diagram on display somewhere in the village.

☐ Explain to participants that the diagram will be used to help to design the project. Interventions and activities will be designed to tackle the negative forces whilst using the positive forces to support them. Explain that this will be done later by the project team. Thank everyone for their contributions.

☐ Bear in mind that not all the negative forces can be easily tackled by a project - as a project developer you will have to make a judgement about which lie beyond the scope of a project, although even for these difficult negative forces, it may be possible to design interventions that help to mitigate their effects.

A. Examples of visioning