

Visual Planning: A Process Outline¹

Originally developed by Suzi Quixley in the 1980's, **Visual Planning**² began life as a modified form of brainstorming. Visual Planning has a number of advantages over conventional brainstorming. **In addition to capturing participant ideas, Visual Planning:**

- Encourages equal participation by all group members.
- Allows less outspoken members to contribute equally to the pool of group ideas.
- Can enable anonymous participation (if appropriate to the setting).
- Immediately organises participants' contributions, whilst at the same time allowing for easy re-ordering of ideas.
- Gives a sense of weight and importance to shared ideas.
- Helps identify common ground and build group cohesion.
- May help to identify differences which require resolution.
- Can function as a voting tool (if appropriate to the setting).

Visual Planning is a values-driven approach:

Core Principle: Groups function best when:

1. The existing competencies and interests of participants are valued.
2. New opportunities for development build on this existing expertise.

The *existing competencies* of participants include their knowledge, skills, values and/or attitudes.

Over time, Visual Planning has developed to become a sophisticated tool which is used in a wide variety of group settings:

- **Education/Training:** A Visual Plan can be used to identify what participants already know about a topic, or to identify competency gaps. An experienced lecturer/trainer can customise their presentation to build on existing participant knowledge. Alternately, a workshop process can focus on *filling the gaps* - affirming the areas in which participants are already competent, then addressing gaps.
- **Planning/Organisational Developmental:** A Visual Plan can provide a basis for strategic planning or development of organisational frameworks (eg. values or vision). Working from a Visual Plan helps generate a sense of ownership of organisational direction amongst participants. It can also visually highlight areas

¹ © Copyright Suzi Quixley, 1994 & 2009 (revised). It appeared in its original form as a chapter in: Quixley, Suzi (1995) **8 Participatory Training Learning Methods**, ESSQ, Adelaide.

² This method used to be called VPP - Visual Participatory Planning.

requiring further discussion or negotiation (particularly if different participants present ideas in obvious tension or contraction).

- **Qualitative Research/Consultation:** A Visual Plan can be used at the beginning or end of the process - to create a basis for discussion, or to identify participant priorities following the opportunity to hear everyone's ideas. This has the added benefit of generating data in participants' own words - a collection of *quotable quotes*! It can also help focus outcomes (eg. if you ask participants to identify their *Top 3 Ideas* in relation to the topic or issue).

Whilst largely a group work tool, Visual Planning can also be used as a counselling or individual professional development tool. The same basic principles apply to use of Visual Planning with individuals. It is particularly useful when trying to organise a mass of data (eg. identifying all the tasks a worker undertakes, then moving them around to develop a workload plan).

The Basic Steps in Developing a Visual Plan

1. Put a pile of slips of coloured paper (each about 1/4 of an A4 sheet) in the middle of the room, along with a texta pen for each participant. (It is useful if you use a range of different colours of paper, since different colours seem to stimulate thinking in different people, and each person seems to be stimulated along different lines of thought by different colours.)
2. Ask each participant to take an equal number of pieces of paper and a texta pen - it can be useful to start by asking each person to take 5 pieces of paper (or less if it will involve difficult thinking; more if a large amount of working data is required).
3. Ask them to write a **single, different idea** on the topic (eg. *ideas for a program*, or, *how they learn best*, or, *different methods of consultation*) on each slip of paper. Ask them to write their ideas in a way that *stands alone* (ie. can be understood without verbal explanation). It is important that ideas are written in texta, so they can be read from at least 3 metres away.
4. As participants' ideas begin to flow, ask them to write further ideas (eg. if you originally asked for 5 ideas, ask for another 5).
5. By now, each participant should have a pile of slips of paper - each with a different idea in response to the topic.
6. Ask a volunteer to give you one of their ideas. Place this on the floor facing the group. Ask anyone who thinks they have a similar/related idea to place it in line below the original idea.
7. Ask for another idea which represents a completely new line of thought. Again, ask people to place similar/related ideas below this. (You should now have 2 lines of thinking, next to each other, facing the group.)
8. Using half an A4 piece of paper, negotiate a heading (which summarises the ideas) for each line.

9. Open up the process. Invite participants to gradually/slowly, reading all the ideas already on the floor, either add their idea to an existing line, or start a new line. Continue this process until all ideas are in place on the floor. **At the same time**, draft headings for the top of emerging lines, using larger pieces of paper. (You should now have several lines of thinking - some with many ideas in them; some with only 1 or 2 ideas - on the floor, facing the group.)
10. Negotiate the emerging headings with the group, and readily rewrite them if people are unhappy with the language. Often, as you discuss possible headings, some negotiation happens concurrently with the group about whether ideas are located clearly ... or whether some need to be moved.
11. Discuss the lines of thought with only 1 or 2 ideas in them. Do they relate to other ideas on the floor? (If the group agrees, these can be rationalised into existing lines of thought. It is important that any movement of ideas doesn't generalise a line of thought to the point that it becomes less clear/focussed.)
12. Discuss the lines of thought with a large number of ideas in them. Are these all very similar, or could they be reordered into 2 or more themes? (If the group agrees, these can be split, and given new headings.)

You now have a **Visual Plan** ... a brainstorm of participants' ideas, ordered into logical groupings. These can be picked up again and re-ordered under completely new headings.

Variations on the Technique

The same process can be undertaken, with the only variation being use of **pre-set headings**. This can work well in settings where the context is predetermined:

Example 1: You are developing a Strategic Plan for your program area for 2010. The group is required to work within the 2009-2012 Plan for the whole organisation. Participants could be invited to suggest activities for 2010. The *Aims* outlined in the 2009-2012 Plan would be set out on the floor, and you could ask participants to locate their ideas within these Aims.

Example 2: You are running a training program on short term helping. The content of the session is to introduce a 5 function model:

1. Clarifying the problem.
2. Analysing the problem.
3. Providing information/referral.
4. Building trust.
5. Planning action.

Imagine that you asked participants to identify their existing helping skills on the slips of paper. In order to make a connection between their existing competencies and the training program, you might set up the Visual Plan with the 5 elements of the model as the headings. Then, you'd ask participants to locate their skills under these headings.

Instead of using a mixture of coloured paper, you can propose **different meanings for different colours**:

Example: Imagine that you're running a training session on different methods of training/learning. You might ask participants to share their existing training methods. You might suggest that they write *kinesthetic* methods on green, *visual* methods on yellow and *auditory* methods on red.)

Sometimes you know the content of the information that needs to be processed. You can develop a learning exercise where **you develop the full content of the Visual Plan**:

Example 1: You believe your staff need to learn about bookkeeping. Instead of a long lecture, you could give brief input on how the organisation's books are structured. Then draw up the structure on the floor, using masking tape and pre-set headings. Give small groups a pack of slips of coloured paper on which all the items of expenditure over a single typical month are written. Staff are then required to 'write up' the books for this expenditure, by locating the slips under the appropriate heading.

Example 2: You are training people in dealing with difficult behaviours in groups. You could give participants a pack of slips on which 50-60 different roles people play in groups are written. They need to put these under 2 headings - 'constructive' behaviours and 'destructive' behaviours. (Incidentally, they pretty quickly discover that any behaviour can be used positively or negatively in a group!)

Visual Planning can also be a great way to **plan an essay or report**. Just write every idea, or argument, or piece of evidence, or reference, you want to include on a separate piece of paper. Then move them around until logically grouped and sequenced. Visual Planning can (almost!) write your report for you!!! If you have enough ideas, a Visual Plan can articulate all the content of the piece of written work:

- The heading at the top of each line of ideas is the lead sentence for a paragraph.
- Horizontally - Each heading should be acknowledged in both the Introduction and Conclusion of the document.
- Vertically - Each line represents a paragraph; each slip of paper details the main content for a sentence ... all you have to do is re-craft it into an accessible sentence!