TOOL 6

Visioning exercise
This is a suggested structure for a facilitated session.

1. The external environment – why now? What are the issues we’re trying to address by working collaboratively? (partners working together – flip-chart responses)

2. Partnership aims or ‘collaborative advantage’ – what could be achieved by working collectively that we couldn’t achieve on our own? (working in own organisation groups – feedback to whole group – flip-chart responses under each heading)
   - Reducing costs
   - Increasing and/or diversifying income
   - Increasing influence (raising public profile)
   - Improving the use of resources (building, staffing, ICT, equipment, skills etc)
   - Reducing duplication of services
   - Improving co-ordination of services.

3. Be specific – eg if you want to meet more need, how do you know what that need is? What is the likely demand? How can it be resourced? Who are your target beneficiaries? What will change as a result? etc (working as a group)

4. Organisational aims: How will this help each organisation to deliver service improvements? (working independently – feedback to whole group – flip-chart responses under each heading)
   - Increasing services or maintaining services (that otherwise might be lost)
   - Improving the quality of services
   - Extending reach (either into new geographical areas, or reaching a new service user group)
   - Developing new or specialised services.

5. Be specific – eg. which services could be lost? Why? When? How will efficiency savings from partnership working enable you to maintain these services? To what extent? (working independently)

6. Risks/ costs/ and benefits (financial and social) matrix with weightings for each organisation (working individually and then together to review results). See also Undertaking a risk assessment on page 27.

It is recommended that you write up the notes of the day – you, the neutral facilitator, can present the information in a balanced way. The information presented should now show:
   - Clear aims for the partnership
   - Information about the external environment
   - Drivers for collaborative working
   - A cost/benefit analysis
   - A risk assessment for each organisation and the partnership.

All of which can be used as a basis for a strategic plan for the partnership.