

Deep Visioning:

*An action research seminar
on visioning and
an integral visioning method*

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Any student of the rise and fall of cultures cannot fail to be impressed by the role played in this historical succession by the image of the future. As long as a society's image is positive and flourishing the flower of culture is in full bloom. Once the image begins to decay and lose its vitality, however, the culture does not long survive.

Fred Polak.

Abstract

This paper provides a record of an action research training seminar on visioning as a futures method. The seminar was conducted for a class of second year Masters students in Strategic Foresight at the Australian Foresight Institute in 2004. An overview of the day's process and elements are presented, followed by the outcomes of the action research. Several different theories for the consideration of visioning as a futures method were included in the seminar. These included Fred Polak's future image analysis framework, Jean Gebser's worldviews and Claus Otto Scharmer's Presencing U-Model. In light of the action research and theory overviews, a synthesis of the day's activity and learning is presented from the perspective of the author of this paper. The result is a proposed theoretical and methodological approach to visioning that may be characterised as a transformational method. This paper does not attempt to provide a comprehensive review of the seminar, nor presume that the visioning theory and method proposed is entirely rigorous. It is offered with the intent of renewing a dialogue about the theory, method and practice of visioning as a futures method in the hope of further developing its value in practice.

The positive image of the future in its classic form becomes one of the main instruments of culture, providing both a vision of civilisation and the tools for realising it.

Fred Polak

Contents

Hindsight on Visioning	4
Insight on Visioning	5
Seminar Context	5
Process Design	5
Element Descriptions	8
Research Findings	16
Foresight on Visioning	21
Deep Visioning	21
Conclusion	23
Notes	24
References	26

*An awareness of ideal values is the first step in the conscious creation of images of the future,
... for a value is by definition that which guides towards a 'valued' future.*

Fred Polak

Hindsight On Visioning

.....*In search of a theory.*

Visioning is a common futures method. What is meant by visioning within the futures discourse is however, as flexible as the diverse use of the term 'scenario.' These two terms are often used without precision to describe almost any conception of future realities. Visioning, like scenarios, does however have a distinct history of development within the field of futures studies. Developed primarily in practice, visioning began formally in 1962 with Robert Jungk's 'future workshops' and rose to prominence in the 70s and early 80s.¹ Visioning was however, largely relegated to one tool among many in the 90s.² Visioning is a description for numerous methods used in conjunction with a wide variety of futures processes and contexts.³

A prominent proponent of visioning in the 90's through to today is Clem Bezhold. He defines visioning as 'a compelling, inspiring statement of the preferred future that the authors and those who subscribe to the vision want to create.' [ref Clem Bezold KBFS] From Bezhold's experience 'scenarios and forecasts are 'futures for the head.' In contrast, visions are 'futures for the heart.'⁴

A key feature of writings on visioning in the future discourse, in comparison to the ubiquitous scenario for example, is the relative lack of theoretical development to underpin the methods proposed. On the face of it, visioning seems very simple, something anyone could do. The real focus of most available articles on visioning, and there aren't many, surrounds three aspects of visioning. Firstly, on how to develop the motivation and focus to conduct a visioning exercise and implement its results. Secondly, emphasising the collective nature of visioning, how visioning can be used by any group to arrive at an inspiring and challenging shared focus. Thirdly, distinguishing where a particular method of visioning may best be situated within a foresight process, often in terms of relationship to a broader engagement with planning and action in general. The scenario and futures studies literature in general however, also deals with these practical methodology use issues.

Bezold's distinction that visioning engages the heart of participants might provide one explanation for the lack of theoretical development. Engaging the heart is an inherently subjective, and possibly then an inter-subjective, activity. As a subjectively focused injunction, visioning stands out within the futures discourse of its heyday, dominated as it was by exterior, positivist, empirically based methods. With this relatively unique nature in mind, and considering its (ironically) practical grass roots focus of implementation, it is understandable that the proponents of visioning focused on valuable reported outcomes, rather than theoretical origins. Theoretical origins, even if available in rich supply, may have provided a target for excessive criticism from the dominant discourse. This possible explanation however, does not excuse the lack of methodological rigour. There are many credible sources within psychology and the social sciences in general to draw on to illuminate, refine and possibly evolve various visioning methods. The room for a more adequate theory of visioning has been ripe for a long time.

Our concerns centre on those crystallised expectations that picture a radically different world in an Other time, and that they are imaginatively shaped in such a way that they can be applied on behalf of mankind.

Fred Polak

Insight On Visioning

.....*Designing the space for emergent comprehension.*

With an understanding of this context of the nature and history of visioning as a futures method, the Australia Foresight Institute (AFI) conducted a day long training seminar on visioning to explore its nature, value and process positioning as a futures method.⁵ The training seminar was intended to be an experiential learning day with a focus on the participants generating answers to the following three questions:

1. What is Visioning?
2. Is it a futures method? And if so, how could it be used?
3. What should practitioners of visioning be aware of and be-ware of?

Seminar Context

The visioning training seminar was conducted on the third day of a five day course. The course, Foresight Methodologies 2, is the second unit of the graduate diploma year (2nd) of the Masters of Strategic Foresight at the AFI. On the preceding two days a foundation of theory and discussion layered a rich context for the engagement in the visioning seminar by the student participants. On the first day a lengthy review of action learning and research theory, and some possibilities for these theories within the field of futures studies, were presented in a lecture and discussion.⁶ On the second day one segment included an experience of action learning as applied to another method used in futures studies, systems causal loop mapping.⁷ Within the Masters course more generally, the unit is designed to go deeper into particular futures methods and include a larger experiential component. This builds on a more reflective theory and literature based learning style of the first year, and leads into a more practice orientated third year.

The intention of the facilitators in light of this contextual positioning, was to provide students with their first deep immersion in experiencing a futures methodology during the Masters programme.

Process Design

Two groups of theoretical sources were brought together in the design, process and content of the seminar. The first group were the primary foundation for the seminar's design and process. The second group were focused on the seminar's content elements. These theories were chosen for their potential relevance within the education and/or visioning contexts, from the perspective of the facilitators, and for their depth of scholarship. Each of the theories is based on solid repudiable work. Both groups of theories informed the key activities of the other groups, and were loosely

applied. The theories were used that is, 'in an emergent manner' to frame the learning space and allow for rich content to be uniquely created through the interaction of the process, facilitators and participants. The intent was that the lessons, insights and experiences most relevant to the participants would be included in what emerges and retained by the participants.

It will be helpful to have a road map of the day's process in mind when considering the various theories and activities included in the training seminar. An approximate schedule is presented in the table below. The content of each segment will be discussed as this paper progresses.

Session	Time	Segment	Description
Morning	9:30 – 9:50	Meta-considerations	Overview of seminar design and purpose, the research questions and role of participants and facilitators
	9:50 – 10:30	Framing	Introduction to three theories possibly relevant to visioning (Polak, Gebser, & Scharmer)
Break	10:30 – 11:00	Morning tea	Majority of group enjoy a coffee while discussing the theories presented;)
Middle	11:00 – 12:15	Experience	Guided visioning process
	12:15 – 12:55	De-brief	Structured de-brief on personal experiences of visioning session
	12:55 – 1:00	Group selection	Self selection in committing to answering one of the days research questions
Lunch	1:00 – 2:30	Small group work	Over lunch, each small group question, discusses and records insights from their experiences in consideration of one of the questions
Afternoon	2:30 – 3:15	Research review	Each small group presents their findings to the whole group with some discussion and clarification
	3:15 – 3:45	Seminar review	Questions, answers and comments from participants to facilitators and group as a whole

Table 2.: Visioning Training Seminar Schedule

An outline of the design theories and the part they played informing the role of the facilitator and shaping the content of the day will be outlined to provide a sense of the seminar's nature. The theories will be presented, in some instances, in more depth than they were during the seminar. This is done so that provision is made for:

- Including some of the established contextual knowledge of the participants for the reader;
- Achieving more coherency within this paper as a stand alone written record of the seminar;
- Illuminating some of the intentions of the facilitators in using the theories in the design and content of the seminar; and,
- Facilitation of the final section of this paper, where a new theory and method for conducting visioning will be proposed.

Reg Revan's Action Research and Learning

The core thesis of Action Research and Learning (ARL) is well surmised in Humberto Maturana's dictum that 'all knowing is doing, all doing is knowing.'⁸ Building on Reg Revan's original model

for action learning ('learning = P + Q (+E)'), the modern origin of formalised ARL, there are three common sources of learning:

- [P] Program Information – learning from books, teachers and other sources of already existing information. Generates received knowledge;
- [E] Experience – learning from doing. Generates embodied knowledge; and,
- [Q] Insightful Questioning – learning through reflection and inquiry into received and embodied knowledge. Generates new knowledge.⁹

ARL emphasises the importance of the action domain, that of personal and collective experience, in combination with acquiring received knowledge through 'program information' and generating new knowledge through 'insightful questioning' to produce more practical knowledge.

There are many methods for ARL varying between contexts and purposes amongst numerous other variables. A general model of ARL was discussed with the participants, in light of the course's review of this breadth of approaches two days previously. The intention was for the students to understand the purpose of the designed process for the seminar and to situate the importance of the seminar's research questions. The theory of ARL also characterised the design of the experiential components of the seminar in that the outcomes were not prescribed. The content theories chosen (described below) were offered into the space of the experience to see what would emerge, rather than to pointedly focus the learning on predetermined understandings. The ARL model discussed can be loosely summarised in relationship to Revan's model as follows:

- [P] Review topic and determine questions;
- [E] Enter context and learn through doing; and,
- [Q] Review experience and answer questions in relevant manner.

The concept of iterative applications of the knowledge gained as an essential aspect of ARL was presented to the participants.¹⁰ Each participant now had a grounding experience in using ARL on visioning and could incorporate their learning's, and those gleaned from the group, into their own practice (and/or theorising, and/or method creation) of visioning as a future method. It is the intent of this paper to complete the ARL cycle of knowledge creation.

Peter Senge and Otto Scharmer's Leaning Communities Theory

The learning communities theory is a further development of ARL – the key distinction being the nature of the knowledge generated by different communities that are related to the same topic of focus. The different communities perform distinct, if sometimes overlapping, functions in relationship to generating knowledge about the topic. Together the communities can constitute a knowledge creating system. The functional reality of this is achieved, according to Senge and Scharmer, if each community equally values and facilitates the exchange of knowledge between three characteristic domain focuses of activity:

- 'Research [theory]: a disciplined approach to discovery and understanding, with a commitment to share what's learned;
- Capacity building [method]: enhancing people's awareness and capabilities, individually and collectively, to produce results they truly care about; and
- Practice [praxis]: people working together to achieve practical outcomes.'¹¹

This model of learning communities was summarised for the participants as 'theory,' 'method' and 'praxis' knowledge. The theory can also be used to characterise different types of knowledge about a given subject that may be involved in any one situation of discussing or considering the topic. The theory in the seminar's design and process element selection was important to provide, to paraphrase one of the facilitators, 'a little of each type of knowledge through the day to suit each participants predilection in learning.'¹² The knowledge generation model itself was to act as a 'mindfulness reminder' for the participants on the nature of the days design so they may be primed to accept and investigate the different knowledge types in order to gain a deeper understanding about visioning.

Open Space Technology

To shape the experiential aspects of the seminar involved in the action research and learning, open space technology was employed. The four principles common to 'Open Space Technology' were brought to the attention of the participants at the beginning of the day as a lens through which they could relate to their experiences and that of the group. The four principles were also used to facilitate the selection by participants of the research question they would address, and how they then worked within the self-selected small group to answer their research question. The four principles, often accompanied with a question mark graphic, can be stated as:

1. Whoever comes are the right people;
2. Whatever happens is the only thing that could have happened;
3. When it starts is the right time; and,
4. When it's over, it's over.

Commenting on the value of these principles, the open source 'Open Space World Org' remarks that 'these aren't prescriptive, they are the results of thousands of little experiments.'¹³ The key value highlighted within the seminar was of them facilitating an acceptance of the day's process, fellow participants and their contributions, and, in particular, the experience based aspects and what emerged from them.

Undoubtedly there were many other influences that the facilitators drew on in designing and conducting the visioning training seminar, however these were the main theoretical foundations that were made explicit. It is worth noting that despite the depth of these theories, they were presented succinctly in relevance to the seminar. Each of the theories were also part of the existing knowledge base of the participants due to their use within the current unit and the previous year's study at AFI.

Element Descriptions

Within the design of the seminar each of the three sessions were characterised by a particular type of content. The morning laid the theoretical groundwork, the middle was experiential, and the lunch and afternoon consisted of questions and reviews. Stepping through a description of each session, and their main content segments, in the same order the participants did, will hopefully convey to the reader a sense of the seminars content.

It is impossible to replicate the full content because things only ever happen the same way once (!) and the entire day was predicated on a philosophy of 'trust emergence.' In addition, a significant part of the day was intentionally experiential and can't be adequately conveyed in words. On the

other hand however, it can still be of value to those not at the seminar to learn about it, and for the participants to have a documented record of the day for future reflection.

Morning

The process design outlined above reviewed many of the items of the 'meta-considerations' segment of the morning session. In addition, the general ground rules and tone for the day were established. These included a quiet room, with only chairs in a circle in the centre, no outside light source, and a policy of 'once the door is shut for the start of the session it doesn't open until the end.' The tone of the facilitators in presentation style and speech was measured, sparse, clear and based on very few written notes. It was evident that an effort was being made by the facilitators to generate the exact wording and sequence of explanation of the morning's sessions content in direct relationship to the participant's reception of the material.

The facilitators asked the participants, in particular regard for the theoretical content of the 'meta-considerations' and 'framing' segments, to allow the content to 'simply wash over them.' The intent, to paraphrase the facilitators, 'was to ease the participants into an observing state of mind,' or awareness, where they would allow the 'information to sink into their subconscious' without being overtly mediated.

The 'framing' segment began with mentioning again the research questions for the day. The questions were then physically written on large sheets of paper and stuck up on different walls of the room. The questions thus literally and figuratively framed the seminar space. Three theories were then briefly introduced by the facilitators. The theories were presented as interesting in their own right for a futures practitioner, and possibly of relevance to a consideration of visioning. No links to, or direct explanation of, the theories in relationship to visioning were provided. To quote a repetition by the facilitators, 'they're just interesting.'

A review of each of the theories, albeit brief to their original exposition, yet possibly in more technical detail than provided in the seminar, follows.

Fred Polak's Future Image Analysis Framework

Writing during the industrial watershed years of success and horror after World War II, Fred Polak has become highly regarded within the futures field for his seminal work on 'The Image of the Future.' Translated by Elise Boulding, and propagated widely with her husband Kenneth, creating positive, motivating and viable images of the future has become a corner stone of the futures field.¹⁴ Polak's great scholarship still holds value, even if much may need to be reinterpreted and refined within a post-modern or integral worldview. One reason for its enduring value is the depth and rigour of investigation, and another is that little else of comparable or better quality has become available since. One of the most practical aspects from Polak's historically based analysis is a framework for analysing images of the future, or in this context, the results of a visioning process.

The following Figure 1 presents a simplified representation on Polak's core image analysis framework. While futures studies awaits a scholarly update to Polak's work, it is possible this model will be retained and further developed.

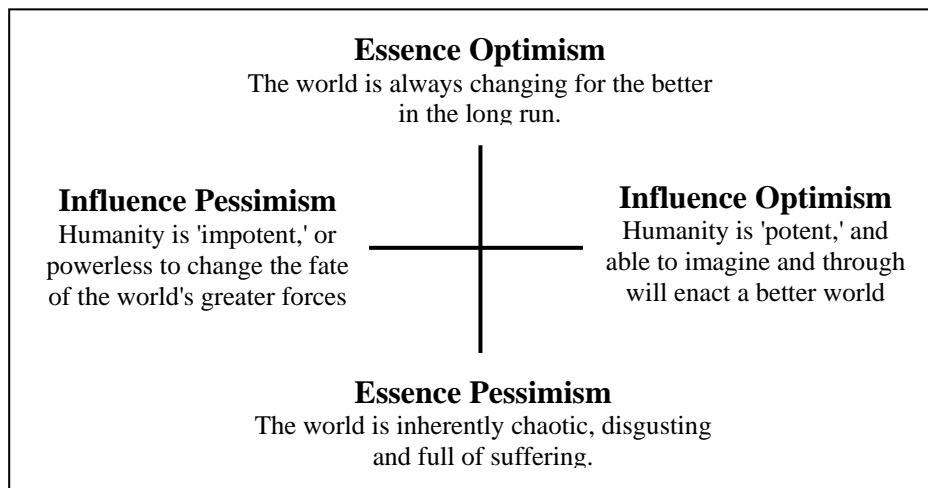


Figure 1.: An adaptation of Polak's Future Image Analysis Framework¹⁵

A brief description of each of the image types should help illumine the nature of the types of images delineated by Polak's analysis framework, and convey a similar understanding of his approach, as the seminar participants received it. These descriptions are based on the presentation provided, but a creative liberty has been taken in conveying the meaning.

- *Essence Pessimism / Influence Pessimism*: The most negative of future images, there is basically no hope whatsoever. The all powerful processes of life are on a set course, and the course is bleak, painful and predominately causes misery for humanity. Humanity is, in the face of this reality, powerless to really change anything for the better. Besides, it's all falling apart anyway, so why bother.
- *Essence Optimism / Influence Optimism*: The most positive of future images, the world is divinely ordered for the best. Given time the all powerful forces of life will reveal how all is acting for the best. There is however, still the thrilling opportunity for humanity to play an active part in shaping the exact form it will take and how soon it will be perfected.
- *Essence Optimism / Influence Pessimism*: The world process is following a set path, working towards betterment in the long run. Humanity can do little to change its destiny, or shape the real events and outcomes of life.
- *Essence Pessimism / Influence Optimism*: The image Polak indicated was most realistic and valuable, from his perspective and times. The greater forces of life do tend to create chaos, suffering and a perpetual challenge to humanity's quality of existence. Humanity can, however, greatly affect the outcome of its lot through generating images of the future to inspire and sustain the will to positive action, and hopefully, outcomes. Polak saw two key divergences in this future image disposition, one that of utopian thought and the other of religious transcendental thought involving a saviour of some description. The utopian stance is described as an active exercise of will. The religious as a relatively 'passive submission to a higher power.'¹⁶

Jean Gebser's Worldviews

The subtle complexity of Jean Gebser's life's work as presented in 'The Ever Present Origin,' is still being discovered in full. Writing in a similar time to Polak, Gebser's work was an attempt to bring a deeper understanding and legitimacy to modes of being, thinking and doing that went beyond the rational-instrumentality of the modern western society. Like Polak, Gebser was interested in the subjective dimensions of humanity's existence, and saw their further investigation of paramount

importance in the face of immanent materialism so dominating his age. Arguably, it still dominates today. Seeing the nascent emergence of an integral worldview, or structure of consciousness, at the beginning of the twentieth century, Gebser sought to explain the different structures of consciousness that humankind has thus far exhibited in order to make room for this new and ameliorating development. Presaged chiefly by a fundamental shift in how a person subjectively relates to time (from an 'analytical system of measurable relationships, to a freedom from time so as to perceive it as a quality and intensity of experience), Gebser worked the majority of his life to point to and validate an integral worldview, or 'manifestations of the aperspectival world.'¹⁷

Integral theory today, incorporating the work of a constellation of theorists, and drawing significantly on the work of Gebser, is championed most notably by the American philosopher Ken Wilber.¹⁸ An integral approach to futures studies, it needs to be noted, is a primary activity of research and study at AFI, and the sole focus of the next unit for the seminar's participants.

To convey a sense of the immensity of Gebser's articulation of the structures of human consciousness, a small sampling of some of his cross sections of the structures are presented below in Table 2. Gebser also identifies one structure before and after those presented below, the 'archaic' and 'integral' respectively. As only the 'magic,' 'mythic' and 'mental' were presented during the seminar, these will be the ones included here.

	Magic	Mythic	Mental
Sign	Point	Circle	Triangle
Essence	Fused oneness	Polarity - ambivalence	Duality – opposition
Potentiality	Unification through hearing/hearkening	Unification by complementarity and correspondence	Unification by synthesis and reconciliation
Subjective emphasis	Emotion	Imagination	Abstraction
Organ of emphasis	Viscera-Ear	Heart-Mouth	Brain-Eye
Perspectivity	Pre-perspectival	Unperspectival	Perspectival
Mode of thought	Pre-rational, pre-casual analogical	Irrational, no-causal, polar	Rational, causal, directed
Form of thought	Recognised world	Interpreted world	Conceptualised world
Main Agency	Instinct, drive, emotion	Imagination, sensibility, disposition	Reflection, abstraction, will/volition
Consciousness degree and relation	Sleeping – outer-related to nature, exhaling	Dreaming – inner-related to psyche, inhaling	Wakefulness – outer-related to spatial world, exhaling

Table 2.: Some cross-sections of Gebser's structures of human consciousness¹⁹

During the seminar, most of these aspects of the three structures, 'magic,' 'mythic' and 'mental,' were presented to the class basically as they are in Table 2. The 'sign,' 'essence' and 'potentiality' of the structures was emphasised however, so that the participants gained a clear understanding of the differences between the three structures.

Otto Scharmer's Presencing U-Model

Working with Peter Senge, Joseph Jaworski and Betty Sue Flowers, Otto Scharmer has recently developed, trialled and published books about their Presencing U-Model.²⁰ Scharmer is a noted academic and consultant in the fields of organisational learning, leadership and change. In

summarising what 'Presencing' is, Scharmer describes it as an 'evolving new learning capacity.'²¹ This capacity, that the U-Model maps, involves 'sensing, embodying, and enacting emerging futures.'²² It is worth noting the Presencing U-Model is meticulously researched and has been tested in scholarly as well as practical contexts.

The Presencing approach to learning is fundamentally different to normal theories and derived methods, and practical experiences of learning. Scharmer presents that previous learning models, mostly based on the experiential learning theory of David Kolb and Roger Fry (building on Kurt Lewin's work), are related in time towards the past.²³ That is, their focus of learning is on bringing past actualities into clarity in the now so they can be reflected on for insights.²⁴ Presencing, in contrast, is based on learning from the future. That is, the focus of learning during Presencing is on bringing future possibilities into the 'now' so they can be reflected on, embodied and enacted.²⁵

The U-Model as shown in Figure 2 below, aside from figuratively indicating that it is about you, the learner, depicts an inward cycle of subjective attention. Beginning with re-focusing how the outside world is perceived ('opening'), to being present to what is next emerging in one's own consciousness ('presencing'), and outward again to embodying the new insights ('actualising'). This is a simple overview, and is broadly indicated by the three dotted circles in Figure 2 below, but it is the main thrust of the process that the Presencing model describes and that the practice involves.

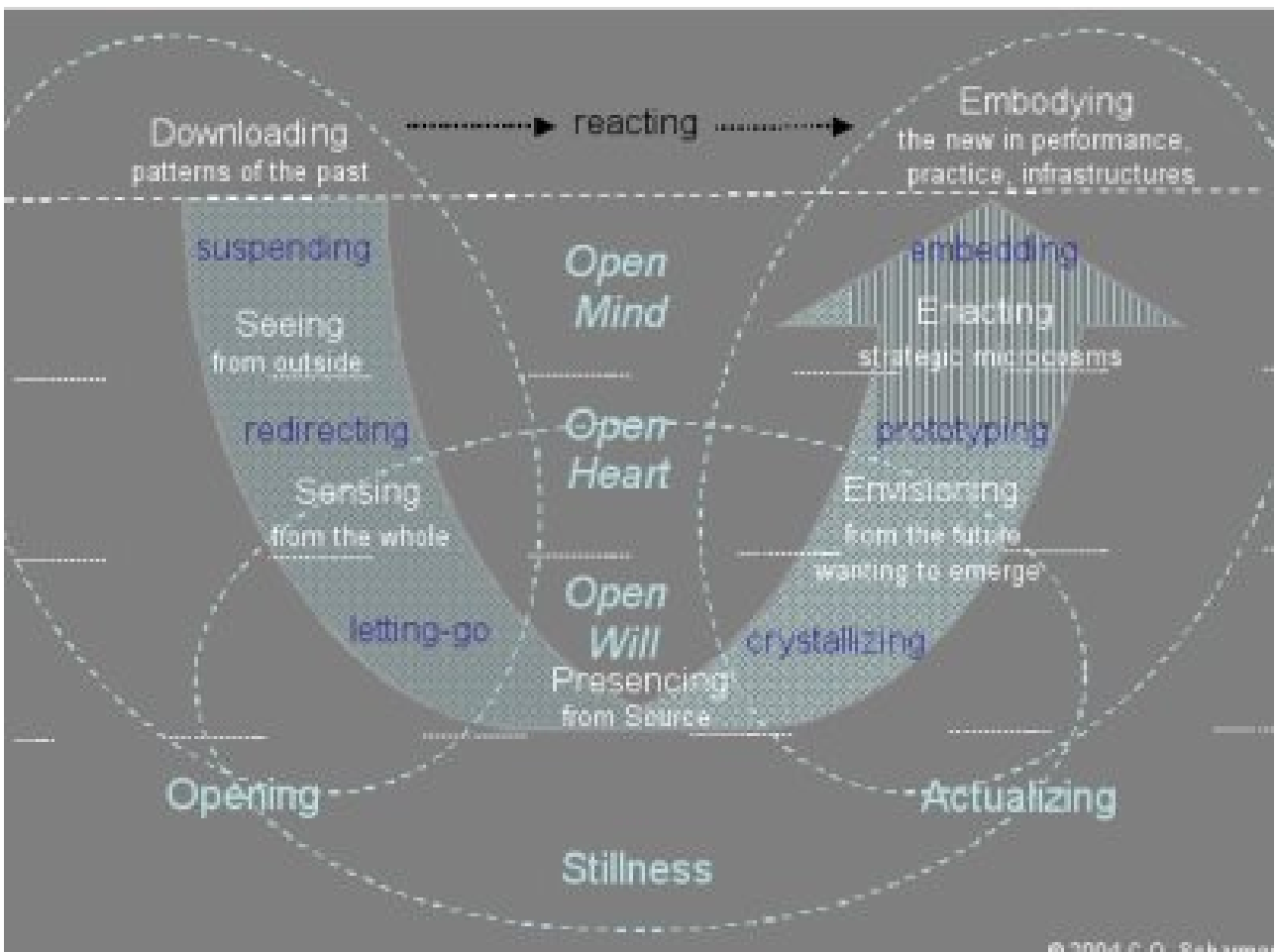


Figure 2.: Otto Scharmer's Presencing U-Model, noting the 'inflection points of cognition and social reality formation'²⁶

In comparison to Gebser and Polak's theories which map subjective realities, and analyse one output thereof respectively, the Presencing U-Model and practice involve an inherently subjective injunction. The legitimacy of the Presencing practice is based more on the subjective experience of its validity than on the 'sense' it makes as an abstracted model. The activities of each step of the Presencing process are known as 'inflection points of cognition and social reality formation' as they change the nature of the subjective experience, and as a consequence one's relationship to 'others,' be they people or objects/events. Because of its actively subjective nature, the significant emphasis placed on the model during the seminar (in terms of length of explanation and intensity of the vocal expression involved on behalf of the facilitators), and as it is a very new development, a more detailed overview of the Presencing U-Model follows.²⁷

Opening

The first distinction to note about the model is that it presents an alternative to reacting to change from patterns of the past. Instead, the first phase of Presencing involves 'suspending' the normal patterns of perception and judgment and 'seeing from outside' of the normal identification with the objective world. This involves mental reflection and reinterpretation of what is seen, by allowing it to be as it is, and actively adopting existing mental models to what is perceived. With this new encounter and understanding of common phenomenon, awareness can be 'redirected' to a subtler, often emotive or imaginative intelligence and 'sense of the whole' of the structures of change that are occurring. The important aspect of activity here is the change from 'seeing' with the mind, to 'sensing' it with one's whole awareness as a whole, from the inside as it were, allowing its own internal coherency to reveal any theory or map that may depict it.

Presencing

The activity of the 'redirection' can lead into a complete letting go of the apprehension of the structures of change altogether. Here, one's mind is simply present in the quiet open stillness of innate subjective awareness. One's mind is present to the 'field of knowing' that constitutes the broadest context for both the subjective perceiver, and the objective forms of the world. This, contends Scharmer, allows one's awareness to 'become one with the intention of the emerging whole,' that is, the next form of the change structures that have apprehended with increasing subtlety and wholeness, and eventually let-go of, during the opening phase. The insight, illumination, inspiration or understanding of the 'intention of the emerging whole,' once it emerges in the awareness of the participant, is what flows into the third phase of Presencing, actualisation.

Actualising

After allowing the 'emergent intention' to arise, a fundamental shift in the mind's focus is required, to actively 'quicken and crystallise' the intuition, or 'let come' a new 'vision' of what is possible. The stages of the actualising phase of the Presencing process then mirror, in reverse order, the activities of the opening phase. The vision is 'prototyped' conceptually, and finally new mental models are 'enacted.' The newly emergent model is then 'embodied' through designed action in new processes, practices, infrastructures and so on.

Integral Correlations

Correlating the Presencing U-Model to Ken Wilber's Integral Theory was not part of the seminar. It was however, part of this author's own Presencing process in comprehending the Presencing U-Model. The following observations from a conversation between Otto Sharmar and Ken Wilber are mentioned for their enabling insights for the Deep Visioning (or 'integral visioning') method proposed later.²⁸

Wilber's understanding of the Presencing model include noticing it involves a process for shifting between 'states' of consciousness, or the ontological realms of 'gross,' 'subtle' and 'causal' states. As a 'state technology,' Wilber suggests that the Presencing process facilitates subjective shifts from an opening to the 'gross state' or physical world, through an opening to the inner 'subtle state,' to an opening to the 'casual state' and back out again. This is depicted in Figure 3 below. This raises two important points from an integral theory perspective. First, a person at any one of Gebser's stages of consciousness structure development (and other, less common ones, not mentioned in this presentation) can go through this process, but will do so with content, and in a manner characteristic of, that structure, be it magic, mythic or mental. Second, 'state technologies' that do shift people into 'subtle' and 'casual' states have been shown by psychological research to stimulate the participants' development into more inclusive, and complex, stages of consciousness structure (ala Gebser's magic, mythic, and mental to integral, as mentioned above).

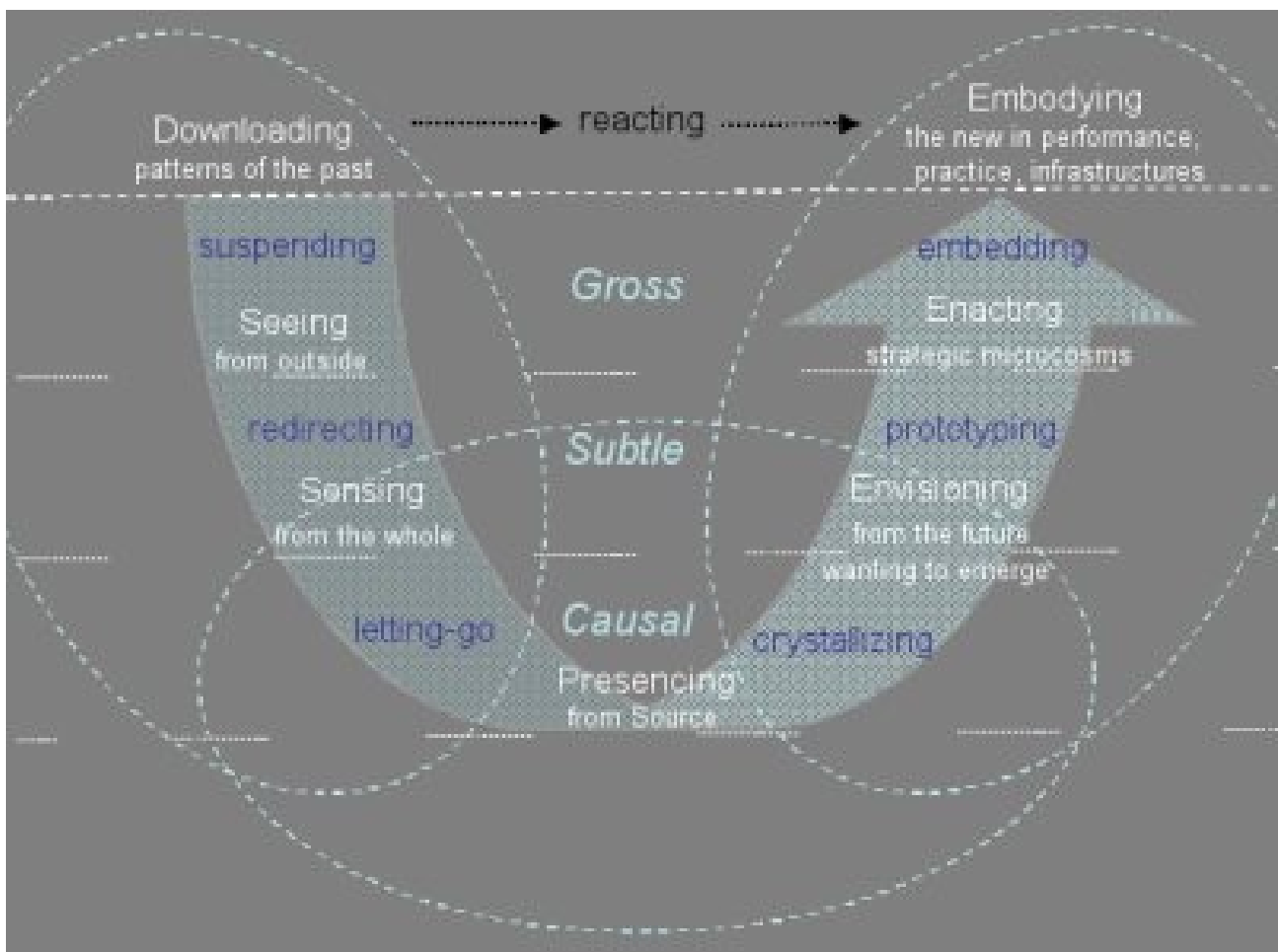


Figure 3.: Wilber's suggested Integral Theory correlations with the ontological realms of 'states of consciousness: gross, subtle and causal'²⁹

As the facilitator's of the seminar suggested in presenting the Presencing U-Model itself, for now, let this be something that may be interesting, and read on to the middle and afternoon sessions of the seminar.

Middle

After a short coffee break, the middle session, of experiencing the 'visioning' aspect of a particular style of visioning process, was conducted.

Visioning Experience

With minimal fuss the facilitators calmly invited the participants to be seated comfortably for the visioning experience. The visioning composed of five segments of equal length and took over an hour. Each included a listening section (with eyes closed) of around 7 minutes and an expression section (with pen and paper) of five minutes. The participants were instructed to not make eye contact at all during the session, with the intention of facilitating them to remain in their 'own space.' In order to convey the barest sense of the experience, some of the design aspects of the visioning process piece are described in Table 3 below.

Segment	Music Description	Structure of Consciousness	Physical Position adopted
1	Agitated, chaotic interruptions	Mental	Sitting on chairs, facing a wall, with hands palm down on a desk.
2	Melodic, punctuated with regular silence.	Mythic	Sitting on chairs, facing into the room in a circle, hands on lap.
3	Spacey, odd, eerie	Magic	On the floor, however comfortable
4	Harmonised, but speeding up, heightened synergies between two almost separate pieces of music	Mythic	Sitting on chairs, facing into the room in a circle, hands on lap.
5	Rhythmic with rushing climaxes	Mental	Sitting on chairs, facing a wall, with hands palm down on a desk.

Table 3.: Design aspects of the visioning experience³⁰

In general, with minimum lighting (turned up only where required for the writing), one facilitator's voice provided a consistent languaging of instructions, with the minimal amount of words, at the transition between each music and writing segment. The design of the script was intended to provide a familiar point of reference for the participants to foster a safe experiential environment, while engaging the 'mental' structure of consciousness as little as possible. This was fostered by the use of a slow, even and soft tone of voice. The framing of Gebser's worldview theory earlier was intended to help at this juncture to, paraphrasing the facilitators, 'invite the participants to be open to going beyond the mental mind to experience other structures of consciousness.' Having created the space, the facilitator's were 'trusting emergence' that whatever was experienced subjectively for each participant would yield some learning insights for them in relationship to visioning and the seminar's action research questions.

Debriefing Process

At the completion of the visioning experience, the participants were invited to pair up and share for a couple of minutes something about their experience. From there, the groups of two were joined to groups of four, and then eight, each with a slightly longer time period to discuss their experience. The iterative discussion process was designed by the facilitator's to enable a 'gradual re-entry' into mental consciousness. The metaphor used by the facilitators to guide the timing of this session was the 'space shuttle re-entry:' too fast and they'd burn up their experience's insights in the glare of the group's full attention, too slow, and they'd bounce away from reflecting and grasping a mental understanding of the experience.

Small Group Selection

In the final segment of the middle session, the participants we asked to stand up and quietly review each of the action research questions on the walls. If one question stood out as holding more meaning, or one that the participant had more to say about, they were instructed to stand in front of that wall. In short order, three groups self selected. The instructions from the facilitators were, over lunch, to discuss the insights arising from the mornings sessions relevant to their chosen question, and to keep a written record of those insights.

Lunch & Afternoon

Following the research questions focused lunch discussion, the participants reassembled and reported their results to the whole group, with some questions and clarification occurring. Finally, questions and comments were invited, either directed to the group as a whole, or to the facilitators. During this period, the nature of the design elements, and the intentions of the facilitators for each session were discussed. For example, the name of the music, the reason for its selection, and the physical positions requested during the visioning experience were disclosed as interpretations by the facilitators of Gebser's worldviews in an attempt to facilitate an experience of them. As the facilitator's remarked, they were 'trusting emergence' throughout the seminar, and were intrigued by the experiences reported where they did and didn't correlate with the design intention.

Research Findings

The experience of the participants of the visioning session showed many differences.³¹ They ranged from the experience of remaining completely present to the rooms physical activity, to focused problem solving styled thinking, through to strongly emotional sensations (including crying) and detailed imaginative visions, to moments of uncommon stillness, poise and elation. Some were 'exhausted' after the seminar, while others were 'energised.' Some found it 'richly rewarding,' while others 'a waste of time.'

Between this diverse experience base, many participants sought out patterns of similarity during the debriefing process (and over lunch) and remarked upon them. For example, some found similar types of experience (as mentioned above), while others were amazed by similar archetypal sequences of the visioning and emotions with each piece of music, and yet some found no correlation in their experience to that of other's whatsoever.

Action Research Questions

A participant provided the following notes and figures from each action research question group. They have been edited only for ease of presentation and coherency where necessary.

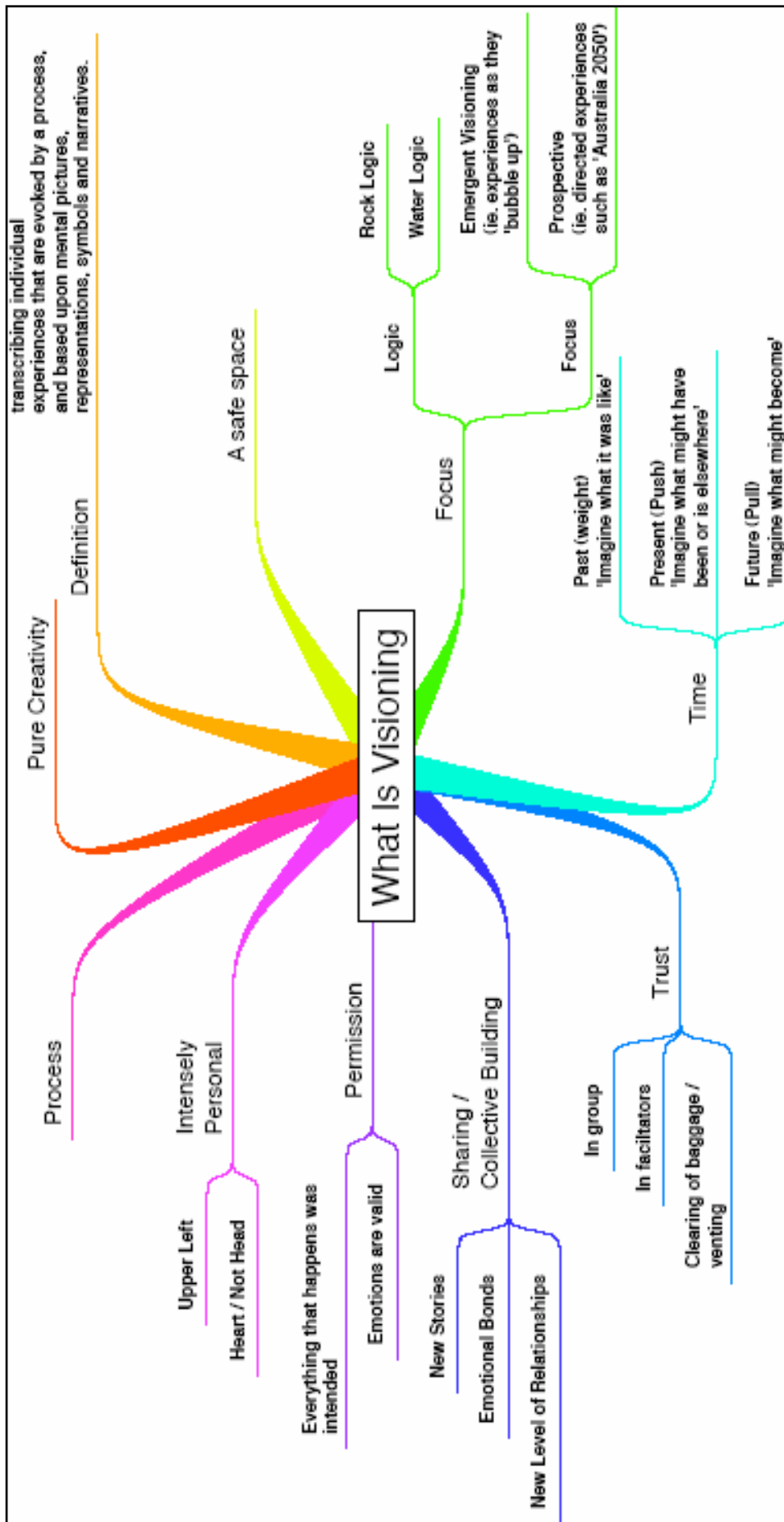


Figure 4.: What is visioning? Action research findings³²

Is it a futures method? And if so, how could it be used in a foresight process?

- It can be a futures method in many ways;
- As a method of clearing before a foresight process;
- Through use as a way of illuminating myth/metaphor for distillation, achieving collective agreement on images/metaphors;
- As full sensory perception rather than just images;
- ‘Images’ of what we want, not necessarily the ‘vision;’
- Reconnection with elemental things – deep now;
- Sensing all resources available to the individual;
- Knowing intent of visioning process is important and requires appropriate facilitation;
- Use to clarify and identify wildcards – as a ‘what if?;’
- Guided – gives freedom to think around issues;
- As process – recursive/iterative:
 - Step one – vision;
 - Step two – review and evaluate, change parameters if wanted;
 - Step three – re-vision;
 - Step Four – integration;
 - Step Five – re-iterate vision;
 - Step Six – enact.

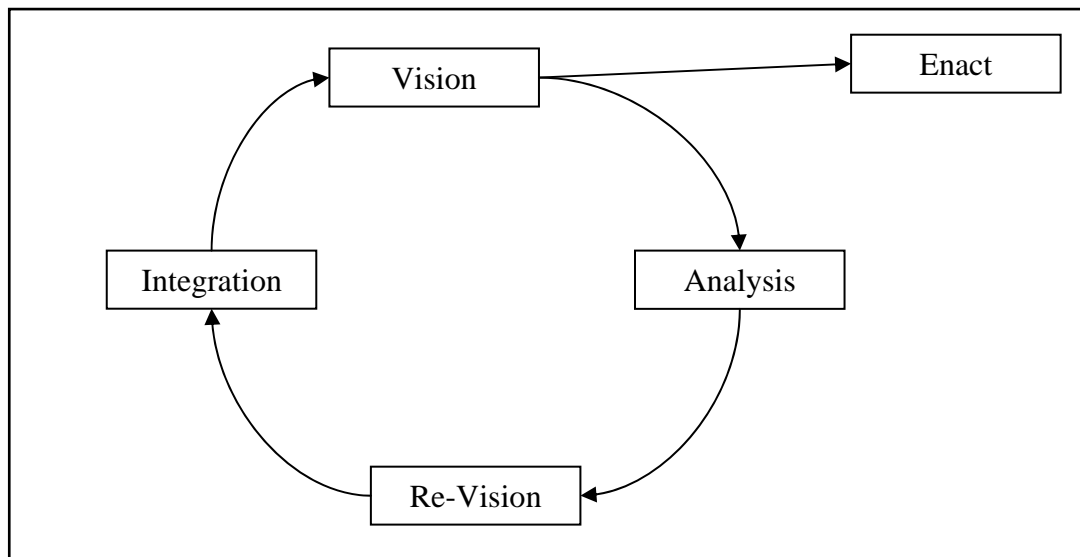


Figure 5.: Visioning as an iterative method³³

Design issues for inclusion in a foresight process

- Be clear on the purpose of the vision in order to facilitate the people in the room;
- Use of music will drive vision:
 - Ensure music is appropriate to the mood wanted;
 - Can music evoke a tone of the vision – stronger music/bolder action?;
- Facilitate self-analysis into language for communication, ensure process includes a method whereby individuals can communicate vision to others;
- Ensure process opens up opportunities for it to work;
- In generic foresight process – can fit in a number of phases:
 - Visioning can act as an input into scenarios, backcasting, or wildcards;
 - Inputs then vision (to illuminate deep truths) then prospecting etc but be clear on where output is going;
 - In the prospecting phase – ‘build futures’ – have to ensure that it hooks into a process that brings it back to today;
- Collective visioning – cross over of archetypes and metaphors – collective unconscious;
- Careful facilitation and analysis of outputs needed;
- If possible have a break in the vision process – record first impression then leave and re-visit; and,
- Tailor visioning process to suit group/pressures and outcome focus.

What should practitioners of visioning be aware of and be-ware of?³⁴

Exterior, objective issues

- Music:
 - Progression basis throughout the exercise;
 - Precedents of images when using well known pieces of music;
 - Potential use of other tools such as poetry;
 - Strongly emotional triggers;
- Capturing content and sharing: individual and group basis in order to divine patterns and themes; e.g. Big 'U', Journey, Cycle, Episodes;
- Transition management through exercise steps;
- Process coaching affecting and colouring the visioning esp. the Big 'U';
- Conflict (with the process) and withdrawal (from process) of subjects;
- Physicality of exercise;
- Scene setting and isolation;
- Dealing with onset sleep apnoea of the participants!

Interior, subjective and inter-subjective issues

- Recognition that it may stir strong emotions which may manifest themselves in behaviour such as crying, anger, frustration. It is important therefore that the group setting is recognised as in a commercial environment the group will have ongoing contact with each other. Trust establishment is therefore important if this is likely to happen;
- Time perception may be lost by the participants;
- It is a VERY personal and subjective experience;
- Music may already be linked to interior uses such as background to problem solving or working;
- There may be a lot of energy released as a result;
- Learning styles, visual, aural, kinaesthetic, cognitive may increase or decrease the access for individuals to the exercise;
- It may produce vivid experiences or even none at all;
- Does gender affect the exercise especially emotional content and expression/sharing? Will males be more reluctant to share that dimension? Issues for consideration.

Meta Consideration of the meta-analysis - Why where people drawn to the question?

- To explore the dimensions of it with the intent of possibly applying it for personal use;
- It was a question that lead towards ethics;
- To investigate why the experience was empty for someone;
- The 'how' of it all, i.e. breaking it down further;
- Exploring the 'open dynamics' of the applied process; and,
- Seeking to fill out the integral theory understanding of the process.

*The force that drives the image of the future is only in part rational and intellectual;
a much larger part is emotional, aesthetic and spiritual.*

Fred Polak

Foresight On Visioning

.....*Creatively proposing a theory.*

During the seminar's final session, a question about the relationship between the 'framing' theories was posed to the facilitators. The facilitator's offered no suggestion. The following approach is an attempt to answer this question. Through a creative combination of the theories a new theoretical basis and method for visioning is proposed. It is important to note that this integration of theories is a creative approach designed to stimulate thinking in this area and not a definitive or exacting theoretical construction. In addition, while this approach draws on the collective insights form the seminar's research findings, it only represents the point of view of the author of this paper, and was not covered during the seminar.

Following the 'learning communities' theory as a rough guide, there are three aspects to this proposed approach to visioning:

1. *Praxis* – Including the appropriate design, framing and facilitation of the visioning exercise to suit the foresight process it is used in, the participants and the content focus of the exercise. In this regard, many of the research findings presented above will be helpful, and so will not be the focus of this proposed approach, although it is essential they be considered within any actual use of this approach;
2. *Method* – Drawing on the seminar's visioning experience design, and the action research findings, the first creative proposition of this approach uses the Presencing U-Model and Gebser's worldviews as guides to designing a method for a visioning processes; and,
3. *Theory* – Some insights offered, by the theories combined, for the nature of the experiences of participants and the subsequent requirements of the facilitator are highlighted.

Deep Visioning

Following the iterative visioning process outlined in Figure 5, the Presencing U-Model and Gebser's worldview theory (as used in the seminar's visioning experience design, Table 3) can be used to inform a visioning design process. In addition, Polak's future image analysis framework is used iteratively to review the content of each visioning process. This approach is outlined in Table 4 below. Some notes on interpreting this method and theory correlation follow the table, and while brief, provide an indication of the subtleties indicated by the theories that will be required for the design and facilitation of this kind of visioning method.

Step	Activity	U-Model Stage Injunctions	Gebser Worldview's stimulated	'State' encouraged
1	<i>Vision</i> – to review and release structures of change	Opening: <ul style="list-style-type: none"> ▪ Downloading patterns from the past; ▪ Suspending – seeing from outside; and, ▪ Redirecting – sensing from the whole. 	Mental	Gross
2	<i>Analysis</i> – group process to highlight patterns and metaphors of similarity, and using Polak's future image analysis framework		Mythic	Subtle
3	<i>Re-Vision</i> – inviting new insights and possible directions/forms	Presencing: <ul style="list-style-type: none"> ▪ Letting go; ▪ Presencing; and, ▪ Letting come – crystallising. 	Magic	Casual
4	<i>Integration</i> – group process to highlight patterns and metaphors of similarity, and vetted using Polak's future image analysis framework			
5	<i>Vision</i> – to visualise and conceptualise possible manifestation	Actualise: <ul style="list-style-type: none"> ▪ Envisioning; ▪ Prototyping; ▪ Enacting; and, ▪ Embedding. 	Mythic	Subtle
6	<i>Enact</i> – group process to model and define similar emergent manifestation designs, check using Polak's future image analysis framework		Mental	Gross

Table 4.: An integral visioning method

Each of the activities would involve a carefully facilitated process where appropriate methods, of either providing visioning instructions/experience or group dialogue processes, are designed to achieve the stated 'activity outcomes.' The dialogue aspects of this method may require a facilitator who is able to adopt an 'integral worldview' in order to competently integrate the various content offerings from participants accessing different structures of consciousness (including different sense based experiences, eg visual, auditory, and kinaesthetic) and coming from varied worldview discourses and so on.

Each activity's use of the U-Model injunctions is repeated first individually, in visioning processes, and then collectively, in dialoguing processes. Covering the same ground twice like this allows for personal apprehension and learning, and then collective learning, which adds to the comprehensiveness of each injunction's outcomes.³⁵ The final U-Model stage of 'embodying' would use the outputs from the overall visioning process, combined with the 'embedded' understanding of the participants, as inputs into the remainder of the foresight process which would then feed into the organisation's activities.

The Gebser 'worldview's' stimulated, and ontological 'states' encouraged, could well elicit very different contents from different participants depending on the structure of consciousness they are habitually 'centred' in. For example, someone who normally operates from the mythic level of consciousness, may not experience and/or offer the mental level definitions that the final stage of enactment requires. Another example might include a participant who is centred at a post-rational structure of consciousness, not even included in the theory presentations in this paper.³⁶ Such a participant may experience and offer content from a 'subtle' structural stage of consciousness for the group, which others at a different structure, such as our mythic level participant, may not comprehend fully.

One of the more interesting outcomes of using this visioning process may be fundamental shifts, likely only temporary, to different structures of consciousness (be they 'higher' or 'lower' developmentally) for different participants, from the structure of consciousness they are used to operating at. This may be a disorientating, enlivening or exhausting experience that could have profound impacts on the participants. An awareness of this potential during the design and practice of this visioning method is advisable. In addition, an understanding of, or skills that, can allow the facilitator to assist people to be comfortable during these experiences, and ideally to adequately psychologically integrate them, would also be valuable.

Being aware of these remarkably different individual experiences and offerings to the group process, demands that the facilitator possess an ability to be open to them, and preferably the skill to appropriately interpret and integrate them into the groups dialogue processes. Many possible contents could arise, and a sound appreciation of the different theories, and how they relate to personal and collective experience, would be advisable before conducting the proposed visioning method.

The presentation of this 'deep visioning' method has been necessarily brief, yet building on the seminar, it presents a fundamentally deeper theoretical understanding of visioning than currently available in the futures field. It also proposes a method and indicates some of the facilitator requirements, that are uniquely demanding and yet offer potentially richer rewards, in both process experience and outputs, than normal approaches to visioning.

If you want to change how people think, give them a tool the use of which will lead them to think differently.

Buckminster Fuller

Conclusion

.....*Inviting further development.*

The visioning seminar was a powerful learning experience for most involved, and used in its design many of the theories, methods and practical observations that were being taught. Together they represented an action research occasion that not only produced valuable findings for the individual participants, and the group as a whole, but it has possibly laid the foundations for a new approach to visioning. Whether 'deep visioning' can be evolved to be theoretically sound, practical and useful is yet to be seen. This record of the seminar and some of the leanings that emerged from it, at least from the perspective of one participant, are intended to contribute to further development of visioning in this manner. As such, this paper represents the first word in what will hopefully be a rewarding process of methodology development that can be offered to the futures field in the near future.

Notes

¹ Bell (1997) p300.

² As related by Peter Hayward, guest lecturer at AFI during the visioning seminar discussed in note 5.

³ Schultz (1996).

⁴ Bezold (2000).

⁵ The facilitators for the seminar were Dr Joseph Voros and Mr Peter Hayward of the Australian Foresight Institute. All quotes in this paper, unless otherwise indicated, were taken from an interview with them conducted by the author, on June 7th 2004. Dr Joseph Voros and Prof. Richard Slaughter designed and conducted the course with the inclusion of guest lecturers Mr Jose Ramos and Mr Peter Hayward.

⁶ The Action Research and Learning lecture was presented by Jose Ramos, of the Australian Foresight Institute. All references to action research and learning theories are drawn from Ramos' presentation notes provided during the course. The original references are included in this document were appropriate for the ease of investigation by the reader.

⁷ This segment was conducted by Mr Peter Hayward of the Australian Foresight Institute.

⁸ Scharmer & Senge (2000) p 2.

⁹ From website: http://www.educ.utas.edu.au/users/ilwebb/Research/action_learning.htm accessed June 2004.

¹⁰ <http://www.ics.ltsn.ac.uk/pub/italics/issue1/nunes/008.html>

¹¹ Scharmer & Senge (2000) p7.

¹² Broadly speaking, it could be said that each session in the seminar contained an aspect of each knowledge type, and that each session could be said to be characterised by one of the types of knowledge. In this manner, the seminar's process design can be seen to have involved cycles within cycles through each of the knowledge types. It is important to note however, that this was not a strict rule in the process design, but rather a general guideline adopted by the facilitators.

¹³ From website: <http://www.openspaceworld.org/wiki/wiki/wiki.cgi?OpenSpaceExplanations> accessed June 2004.

¹⁴ Dator (2000).

¹⁵ This adaptation is based on the presentation notes and book summary of Polak's *Image of the Future* provided by Mr Peter Hayward.

¹⁶ Polak (1973) p18.

¹⁷ Gebser pXX p283.

¹⁸ See for example Wilber (2000).

¹⁹ Gebser p116-121 p142-146 p269-270.

²⁰ The two books are *Presencing: Illuminating the Blind Spot of Leadership*, and *Presencing: Shifting the Place from Which Leaders Operate*. In addition, see Scharmer (2000).

²¹ Scharmer (2000) p2.

²² Scharmer (2000) p2.

²³ <http://www.infed.org/biblio/b-explrn.htm>

²⁴ Scharmer (2000) p5.

²⁵ Schamer (2000) p5.

²⁶ Image sourced from <http://www.dialogonleadership.org/wilber.htm> accessed June 2004.

²⁷ All quotes in this section are from Scharmer (2000) p10-16.

²⁸ Online at <http://www.dialogonleadership.org/wilber.htm> accessed June 2004.

²⁹ Image sourced from <http://www.dialogonleadership.org/wilber.htm> accessed June 2004.

³⁰ The facilitators requested that the music not be named, and so the descriptions are a poor creative substitute form the memory of the author.

³¹ The personal experiences quoted here were taken from participant statements submitted for the author for the preparation of this paper on the condition of anonymity.

³² The mind map figure is courtesy of Alessio Breciani.

³³ The figure and notes are courtesy of Rowena Morrow.

³⁴ Notes courtesy of Nick Price.

³⁵ For more on collective intelligence, a highly relevant theoretical and practical base of knowledge for collective visioning processes like the one proposed here, see <http://www.co-intelligence.org/P-dialogue.html>

³⁶ For more information on these and other structural stages of consciousness, including Gebser's worldviews, see Wilber (2000).

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