

## Session 2: Developing Vision and Strategic Targets (11:00–12:30)

### Objective

Equip participants with methods to help clients develop a compelling vision and translate it into strategic goals/targets. By the end of this session, advisors should be comfortable facilitating a visioning exercise and formulating SMART strategic objectives that align with the vision. Participants will also recognize how to tailor the visioning process to different types of businesses (e.g., individual farm vs. cooperative).



#### Activity – Vision Statement Creation (30 min)

Rather than starting with lecture, engage participants immediately in a *visioning exercise* to experience it first-hand. Introduce a fictional but relatable scenario: “*Green Acres Cooperative*” – a group of farmers in an area who are starting a collective agroforestry project but lack a unifying vision. Each group of participants (4–5 people) will act as advisors facilitating a vision brainstorm for this coop. Provide a one-page brief on Green Acres (their context: for example, mixed farms, interested in alley cropping and farm-to-table sales, some want environmental focus, others profitability). Each group’s task: come up with a draft Vision Statement for the cooperative in 15 minutes. Encourage them to use a flipchart, and remind them a vision should be **inspiring, clear, and long-term**. They can list key phrases first (e.g. “*profitable farms, healthy soil, community learning*”) then craft a sentence or two.

- After 15 min, each group presents their draft vision. Applaud creativity. Likely visions might be like: “*Green Acres Coop envisions a thriving rural community where agroforestry sustains livelihoods, biodiversity, and innovation, serving as a model for sustainable farming.*” Discuss briefly: Are these visions motivating? Do they give a direction? Point out good elements (e.g., mentions of sustainability, community, profitability). Also gently critique if needed: e.g., if a vision is too vague or too narrow. This exercise not only teaches visioning but also models a tool advisors can use: a facilitated group vision workshop.



#### Presentation: Characteristics of a Good Vision (10 min)

Now use a few slides to consolidate learning. Define what a Vision Statement is and its characteristics: *clear, inspirational, aligned with values, and oriented to the future*. Emphasize it’s not about specific numbers (that is goals), but the desired future state. Show an example vision from a real agroforestry enterprise (if available) or from known organizations (e.g., “*AGFORWARD project vision: European farming landscapes with trees as key elements for productivity and ecosystem services*” – illustrative example). Mention the importance of **strategic targets** that stem from the vision: if vision is the “*dream*”, strategic targets are the concrete milestones on the way to that dream. Introduce the concept of SMART Goals (**S**pecific, **M**easurable, **A**chievable, **R**elevant, **T**ime-bound) for setting strategic targets.



#### Activity – Setting Strategic Targets (20 min)

Continuing with the “*Green Acres Cooperative*” scenario, each group now develops 2–3 strategic targets that would achieve their vision, applying SMART criteria. For example, if their vision emphasized profitable agroforestry, a target could be “*Increase average farm income by 15% through agroforestry products within 5 years*” (specific, measurable, time-bound). If biodiversity was in the vision, a target might be “*Establish 20 km of hedgerows across member farms in 3 years.*” Groups discuss and write their targets. Trainer moves between groups to assist, ensuring targets are not too generic. After 10–15 minutes, have groups share one target each. Discuss briefly if they meet SMART criteria, and how they relate to the vision. This helps participants practice articulating strategic objectives, a key skill for advisors guiding planning.

**Trainer Tip for Success:** Encourage groups to ensure at least one target addresses economic sustainability (since businesses need profitability), and another addresses environmental or social goals if relevant – demonstrating a

balance often needed in agroforestry strategies (multi-functional benefits). Also, remind them to keep it to a manageable number of strategic targets (3-5 usually), as too many targets can dilute focus.

### Presentation – Vision to Strategy (10 min)

Explain how to go from a broad vision to a strategy. The strategic targets they set are part of that bridge. An advisor would next help the client figure *how* to reach those targets – that is essentially the strategy (the set of actions or approaches). Note that the next sessions (SWOT, etc.) will provide input into deciding those actions. Summarize a simple strategic planning cycle:

Vision -> Goals -> Analysis (SWOT) -> Strategy Choices -> Implementation.

Highlight that it's iterative and can loop back (sometimes vision/goals get refined after analysis). Show a slide of this cycle diagram. Share a success story highlighting vision and goal setting.

### Example – Cooperative with a Common Vision (France)

A dairy farmers' cooperative in southern France decided to integrate trees on their pasturelands for long-term sustainability. Initially, members had different ideas (some just wanted shade for cows, others were interested in timber or biodiversity). An extension advisor facilitated a strategic vision workshop for the coop. Through a series of meetings, they agreed on a unifying vision: *“By 2030, our coop will be a pioneer of climate-smart dairy farming, combining productive pastures with thriving woodlands that enhance animal welfare and income.”* From this, they set strategic targets: e.g., **Plant 5,000 trees on member farms in 5 years; Develop a branded “silvopasture milk” product by year 4; Secure a premium price by marketing the environmental benefits.** Having these targets united the group.

The advisor then helped outline how to achieve them (securing seedlings, training farmers, marketing plan). Over time, the cooperative successfully planted over 6,000 trees and launched a new milk label highlighting agroforestry. Financially, they negotiated a 10% higher price with a local dairy for their differentiated product. Members reported that without the clear vision and goals, this coordinated effort would not have happened.

#### Key Takeaway

A shared vision can align diverse stakeholders, and clear targets make it actionable. The advisor's role as a facilitator was instrumental in getting everyone to agree on the direction.

### Plenary Reflection (5 min)

Ask: *“How would you handle a situation where a client says they don't have time for ‘visioning’ and just want to solve immediate problems?”* This question brings out the challenge of balancing urgent needs vs. strategic planning. Guide participants to consider that sometimes you might integrate strategic planning in small bites, or tie it to immediate concerns (for example- show how a clear strategy can actually solve some short-term issues by providing focus). **Methods Used:** Small-group visioning exercise, collaborative target-setting activity, short presentations with slides, and a real-case discussion. **Interactive element:** very high – participants actively create vision and goals in groups.

### Session 2 Wrap-up

Summarize that defining “Where do we want to go?” (vision) and “What do we want to achieve on the way?” (strategic targets) is the first phase of strategic support. Everything else (analysis, risk, implementation) builds on this foundation. Compliment the group on their creative visions. *“After lunch, we'll dive into tools that help us figure out how to reach those visions – starting with analysing the current situation and the environment (that's SWOT and trend analysis).”*