



# Introduction to VISIS

An Open-Source Method  
for Sustainable Development  
Learning and Planning

**AtKisson**

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## About

**The AtKisson Group** has been a pioneer and innovator in the field of sustainability since 1992. Our earliest work helped to establish standard practice in professional sustainability, especially in the field of indicator development and the training of sustainability change agents. Today, we advise large companies, NGOs, governments, and the United Nations on sustainability strategy, policy, training and decision-making. Our tools and methods have been adopted for use around the world by companies, international agencies, schools and universities. You can be confident that these tools will support you in moving from initial vision to idea, implementation and monitoring. See [www.AtKisson.com](http://www.AtKisson.com) for more information about our history and our other service offerings.

**The VISIS Method** is our approach to doing sustainable development in a systemic, inter-disciplinary and collaborative way. We have made the method itself open-source: anyone may use it, and you may copy this manual for educational purposes. Please note that we retain copyright on the actual text and graphics.

**The Accelerator** is our professional and proprietary toolset, based on VISIS. We make the Accelerator available as a set of documents, including manuals, presentation slides, and spreadsheet templates, in .pdf and Microsoft Office format. For information, please see <http://AtKisson.com/tools/>

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## The VISIS Method: A General Overview

The VISIS Method was first developed in the 1990s, originally to support sustainable development efforts in city and regional planning. Today, the Method is applied in a wide variety of sectors, around the world, as a framework for sustainability planning, training, and stakeholder facilitation.

**"VISIS" stands for "Vision > Indicators > Systems > Innovation > Strategy."** These are the five critical phases in a sequenced, iterative process of goal-setting, assessment, analysis, initiative development, and program or project planning, in a sustainable development context. Doing "VISIS" means doing the following five things, in order:

**V = Vision** = Developing (or identifying existing) long-term goals based on an understanding of sustainability principles and systems thinking. Ideally, a future vision of a truly sustainable company, community, organization, school or university should be grounded in the best available science as well as what is needed and desirable from the perspective of human aspiration and wellbeing. (Note that at the global level, the UN Sustainable Development Goals, SDGs, have provided a common starting Vision and set of goals.)

**I = Indicators** = The development of data, metrics, and information signals relevant to a bounded unit of analysis, or "system" (e.g. city, watershed, organization). The focus on "Indicators" emphasizes that the information signals must be translated into graphic formats that can be understood by a wide variety of users and decision-makers, from many different disciplines and backgrounds. The Indicators should also be connected to the Vision, and should help to show progress towards achieving that desired future state. (Note that many sustainability frameworks, such as the Global Reporting Initiative for companies and organizations, already define sets of sustainability indicators, but these often must be complemented by specific measures.)

**S = Systems** = Using the available data and indicators as inputs to create system analyses. These systems analyses are used to explain the observed historic and current behavior, and to support forecasting and scenario development. They are also used to help in the identification of key points of intervention in the system ("Leverage Points"). Systems analyses can be of varying levels of sophistication, depending on the capacity of a working group or stakeholder audience. Most often, the VISIS Method uses simple system dynamics models, called "System Maps." However, you may use any relevant tools or method you are familiar with, to support the development of a systemic understanding, based on the elements identified at the Indicator stage.

**I = Innovation** = Identifying the kinds of interventions, to be applied at the Leverage Points, that are of highest benefit to the system as a whole and necessary for its long-term sustainability. These "Innovations" may be of any kind, from "hard" changes in technology, investment, and infrastructure changes, to "soft" changes in awareness, attitude, and values. Other kinds of interventions might include policies, regulations, training initiatives, adjustments in goal sets, and the introduction of new feedback mechanisms.



**S = Strategy** = Careful planning for successful introduction and implementation of prioritized Innovations. The "Strategy" phase of the VISIS Method includes the analysis of cultural roles and dynamics that may affect acceptance of the Innovation, in a detailed and holistic way, in addition to traditional strategic planning processes of setting goals and objectives, identifying specific strategic approaches and resources, and performance metrics.

Use of the VISIS Method consists of following this general sequence of actions in an integrated planning or training context. As a methodology, the VISIS approach allows for maximum flexibility in terms of the unit of analysis (system) to which it is being applied, and in terms of the specific tools and processes that are used along the way.

## How to Prepare, and How to Conclude

The VISIS Method covers the generic planning and analysis steps in a sustainable development process, but it is preceded and concluded by two additional critical steps, the "bookends" of the process.

The first step in any VISIS process is called "Preparing the Ground." This involves (1) gathering an appropriately diverse group of stakeholders, experts, or members of a multi-disciplinary working group (whether large or small); and (2) developing a common definition or vision of sustainability appropriate to the target system or unit of analysis (the "V" in VISIS).

On the first point, diversity of participation is an axiom of collaborative planning in sustainable development. However, the VISIS Method can also be successfully applied as a planning, thinking, or learning process, even by a sole practitioner or by a very small team. Implicit in these smaller-scale applications of the Method is the expectation that one will draw on the knowledge and expertise of people in other sectors.

On the second point, formal definitions of sustainability can often vary depending on the perspective of different stakeholders or disciplines. Differences in view about what constitutes sustainability, or unwillingness among group members to be very detailed about future visioning, can sometimes stop a planning process before it even begins. Hence, the VISIS Method allows for flexibility at this starting point. The options include:

1. Developing a formal and **detailed** vision, based on a common definition of the principles or conditions of sustainability that must ultimately be achieved (this process is also sometimes referred to as "backcasting").
2. Developing a more **general** vision statement that describes, in basic terms, a common aspiration or outcome to which the group can all subscribe.
3. **Skipping** the step of formal visioning, and using the process of selecting and developing Indicators as an indirect means of inferring the common vision (because choice of indicator automatically brings with it an assumption that there is a future optimal state for that indicator).

Where groups are relatively well versed in sustainability, and tend to share a common view or definition (such as the UN Sustainable Development Goals or "SDGs"), Option 1 is most

desirable. Where they do not tend to share that view, or when sustainability is a new and unfamiliar term, focusing on generalized future visions rather than technical definitions of sustainability (Option 2) or jumping straight into indicator development (Option 3) can help avoid early obstacles to cross-sector and multi-disciplinary collaboration. Deeper understanding and agreement about sustainability will usually emerge and crystallize during the course of dialogues on system status (Indicators), intervention points (Systems), and possible intervention types (Innovation).

The closing step in the VISIS Method — when it is used for planning — is "Agreement and Action." To be more than a learning exercise, the process of developing a sustainability initiative must lead to firm agreements to implement. The VISIS Method is used both in training and planning contexts, and the arrival at a commitment to implement is what differentiates the two. The design of the Method, and the tools that have been developed to support its use in practice, is intended to greatly increase the chances of arrival at robust agreements that will hold together during the implementation phase, across differences in culture, discipline, and interest.

## A Highly Flexible Approach

Like most variations on the standard planning cycle, the VISIS Method assumes that the process of sustainable development is cyclic and iterative: you do not just do it once. Implementation generates results, which are reflected in Indicators, which become new inputs to a round of System analysis, Innovation, and Strategic planning, on whatever time scale is appropriate to that system.

Moreover, the VISIS Method also assumes that the process is not strictly linear: indicators may be revised based on an evolving systems analysis; systems analyses are revised based on emerging insights and experience; new ideas for Innovations may begin appearing at any point in the process, etc. The sequencing of the VISIS Method supports the forward flow of progress toward completion of a round of interventions and changes, but it is not intended to restrict thinking in a strictly linear way, either for individuals involved or for the working group as a whole.

A key feature of the VISIS Method is its flexibility. It can be used in a great variety of organizational and geographic contexts, from corporate sustainability planning, to regional economic development, to river basin management, to education for sustainable development. This flexibility allows for a unified approach to be applied in different contexts: for example, a regional planning initiative may also promote use of the Method by sub-regional entities, for their training and planning. The method can also be calibrated for different levels of complexity and sophistication, depending on the purpose of the initiative.

Table 1 (page 12) summarizes the various ways that the VISIS Method can be applied at a Beginning, Intermediate, or Advanced/Professional level. There are common or universal features at each level that, in practice, can be calibrated in terms of their complexity to the specific needs of an initiative and/or the capabilities of the target group engaged to work on it.

## Use of Complementary Tools

The VISIS Method maps out a sequence of activities in general terms. In practice, many different specific tools can be used to perform the indicator-based assessment, system analysis, innovation identification, and strategic planning tasks that are necessary to bring sustainable development initiative to fruition. The AtKisson Group's *Accelerator* is one such set of tools. See: <http://AtKisson.com/tools>

However, the VISIS Method supports (and the AtKisson Group encourages) the use of many other tools as well. For example:

- In developing or interpreting Indicators of sustainability, there are many ways to approach the task, from highly disaggregated detailed metrics (specific measures of individual parameters, with their specific methodologies) to highly aggregated indices (such as the Ecological Footprint or the Human Development Index). Other, non-quantitative assessment schemes — interview techniques, expert consultation, etc. — can (and often should) also be accommodated at the Indicator level.
- In doing Systems analysis, there are many techniques to apply, from educationally-designed games and simple exercises to identify critical cause-and-effect linkages, to advanced, computer-based dynamic modeling tools. As noted in Table 1 (next page), choice of tool at this level is very dependent on the capabilities of the users or stakeholder groups, and on the variable needs for precision in the context of initiative planning.
- In working with the Innovation level, many tools and processes are available to generate collaborative brainstorming, survey catalogues of best practice, or facilitate multi-disciplinary design processes.
- At the Strategy level, the full array of management tools comes into play, from traditional "SWOT" analyses (Strengths, Weaknesses, Opportunities, Threats) and strategic planning processes to multi-criteria decision-support tools.

**Table 1. THE VISIS METHOD: A PLANNING MATRIX FOR SUSTAINABILITY**

Use this table to identify which level of complexity and capacity is appropriate to the system *and/or* to the group with whom you are working.

	<i>General Description</i>	<i>Beginner Level / Simple</i>	<i>Intermediate Level</i>	<i>Advanced Level / Complex</i>
V Vision	<i>Set goals or describe a future situation, based on the group's understanding of sustainability</i>	One-sentence descriptive vision statement capturing the essence of a desired future	More detailed goal statements based on an understanding of sustainability principles	Highly detailed description of future sustainable state, based on scientifically defined conditions and group consensus
I Indicators	<i>Assemble and analyze information about what is happening</i>	Look for important issues and trends, and evaluate them as improving, worsening, or staying the same	Develop measurements with data, look for trends and patterns, analyze causes and effects, assess against sustainability criteria	Build comprehensive indicator systems with performance indices scaled to reflect sustainable conditions, optimal states, and collapse thresholds
S Systems	<i>Explore key linkages among elements and find the most effective leverage points for change</i>	Simple sketching and mapping to link issues and indicators in cause-and-effect relationships, identify patterns (understand chains of cause-and-effect)	Basic modeling of stocks, flows, feedback mechanisms, causal loops, and overall dynamics (understand system structures, and change behavior over time)	Quantitative modeling, usually computer-assisted, using real or simulated data inputs to explore past system behavior and future scenarios
I Innovation	<i>Identify specific interventions, changes, techniques and new ideas to be introduced at the leverage points</i>	Brainstorming of new projects, or adopting and adapting existing initiatives, that can improve a key issue and have beneficial side effects throughout the system	Inventory new initiatives, policies, technologies etc. relevant to a prioritized problem set, and feasible to implement at the identified points of leverage	Comprehensive reviews of best practice, research new options, test implementation in a dynamic systems model and/or scenario exercise
S Strategy	<i>Plan for implementation, transition, and long-term success</i>	Identify needed resources, generate sequenced to-do lists, assign tasks to people	Use of "strategy mapping," "SWOT" analyses, "backcasting," "Amoeba mapping" and other techniques to determine best paths forward	Develop a "theory of change" or "logic model," derive goals and objectives, create comprehensive strategic plan with performance metrics, monitor progress
Agreement	<i>Commit to action</i>	Create inter-personal commitments: promises, plans for follow-up engagement, future scheduled events, etc.	Create formal institutional and organizational commitments: task teams, work assignments, budget allocations, timelines	Create binding commitments: regulations, official policies, funded departments and programs, etc.

## Education and Training v. Planning and Decision-Making

As noted earlier, the VISIS Method is designed for use in *both* education and training situations, *and* planning and decision-making processes. Training programs, from upper secondary school to university to senior professional level, have been built around VISIS. Senior officials also use it for developing new strategies and policies at the local, national or inter-governmental level. Other users of the Method in planning and decision-making include corporate executives, funding agencies, military installations, and non-governmental organizations.

Best results are often achieved when the training and planning aspects of sustainable development work are *integrated*: that is, when they reach across traditional boundaries of discipline, department, ministry, etc. The VISIS Method was developed partly as a means of helping people to bridge these common boundaries by giving them a common methodology or roadmap to follow, when collaborating on sustainable development.

The practitioner is encouraged to experiment with the VISIS Method first in a training or capacity-building (practice) context, in order to build familiarity with the thinking processes, and to gain experience in the application of appropriate tools at the various stages.

*NOTE: "Pyramid Lite" — a workshop manual included in the free version of the AtKisson tools, AcceleratorLite — provides a very simplified application of VISIS that does not use technical words (such as "indicator" or "system") but that follows the same logical process. Pyramid Lite is a good way to practice with VISIS and has been used by groups all over the world, from school children in China to professional training workshops. See: <http://AtKisson.com/acceleratorlite>*

## Putting the VISIS Method to Use

As the table describes, there are many ways to take the general architecture of the VISIS process and put it to use. You do not need any special tools or templates; the simple descriptions above should be enough to get you started. Use the tools and methods you have, and follow the VISIS sequence.

However, if you need or want a more structured set of aids to help you, AtKisson Group provides a manual called "StrateSphere" that includes template worksheets for a VISIS process (in its generic form), as part of the AcceleratorPro tools. It also includes a template strategic plan and other analysis support.

Please see our website for more information on licensing the AcceleratorPro tools and becoming part of the global network of Accelerator users.

<http://AtKisson.com/tools>