Guidebook 2

Strategic Visioning for a TimeBank in Your Community
Welcome to the TimeBanking Guide-Book Series

Someone has said of TimeBanking that “it is limited only by our imaginations.” The truth of that can be seen in the great variety of TimeBanks that exist here in the US and around the world. TimeBanks range in size from 20 members to 2,000. Whether you plan to create a TimeBank for a small group of friends and neighbors or one that will operate citywide with the intention of changing whole systems, this wealth of possibilities makes it doubly important to build a strong, shared understanding and vision very early on.

Our Guidebook 2, part of our new training series, presents the “TimeBank Un-Puzzle”, a guide that helps establish vision for your TimeBank and a framework for planning and starting it.

One of the core values of TimeBanking is that everyone has something to give. That is certainly true of the TimeBanking movement. Since the first TimeBanks were formed in 1987, many thousands of individuals have joined to support and use TimeBanking as a tool to build a kinder, more equal and more generous world. At the heart of the Guidebook I, therefore, is the work of all those who have been inspired to jump in, to give it their all, and to share what they learn. That includes the TBUSA Board, the hard-working staff of TBUSA past and present, the contributors and funders of TimeBanking, and, most of all, those who like you have been inspired to place their energy, skills and caring into the creation of a new TimeBank or the running of an existing one. To all, an enormous THANK YOU. It is truly the case that these materials would not be possible without your generous spirit and your wholehearted engagement, learning and sharing over the years.

Guidebook 2, Strategic Visioning for Your TimeBank, of our Guide-Book series, emphasizes use of the “TimeBank Un-Puzzle” by Merlyn Kettering, and draw on learning that has taken place throughout the TimeBanking movement since Edgar Cahn first created TimeBanking, here in the United States in 1980.

We are grateful to the Rudolf Steiner Foundation which has provided the funding to make the new Guidebook series possible. Their choice to invest in TimeBanking reflects their commitment to a more just, fairer, and richer world.

Welcome. Have a GREAT journey with TimeBanking. We are sure you will fall in love with it like so many others have done – and we look forward to meeting you as the proud founder of a TimeBank!

Christine Gray, CEO
TimeBanks USA
October 2009
Guidebook 2 – Strategic Visioning for a TimeBank in Your Community

Section A: Preparing for Strategic Visioning
Section B: Strategic Visioning for a TimeBank
Section C: The Strategic Visioning Profile

✧ Why Create a TimeBank
✧ Who to Get Involved
✧ What a TimeBank Could Do
✧ How It Might Work
# Guidebook 2:
Vision a TimeBank for your Community

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Evaluation of Guidebook 2: Strategic Visioning for a TimeBank
Welcome to TimeBanking!

The Wealth of Possibilities: The Guidebook Series for Neighborhood TimeBanks is for people like you who want to create a TimeBank in their community. The series will help you get started on a journey of learning about TimeBanking, visualize and plan for a TimeBank and get it up-and-running. Each step of the journey will have value and positive results for you, your colleagues and your neighborhood.

TimeBanking is for everyone. All can participate and all will benefit. There are no ‘throw-away people’ and no one is ‘left behind’. By helping each other, people reweave their communities with shared support, strength and trust. By sustaining each other and their neighborhoods, they nurture social commitment for social well-being and change.

TimeBanking is growing. TimeBanking is the inspiration of Dr. Edgar S. Cahn, who originated the idea of TimeBanking in 1980. It was initially called “service credits.” Slowly at first, but now more rapidly, it has become an international movement with local TimeBanks in 38 states and more than 40 countries.

TimeBanks come in all types, sizes and shapes, from 20 members to more than 1000 members. Despite differences, all TimeBanks share the drive to create circles of giving-and-receiving that become growing spirals of positive relationships which strengthen, deepen and expand over time.

Strategic Vision of a TimeBank for your Community. Guidebook 2 helps you envision a TimeBank for your community, building upon basic concepts and practices of TimeBanking presented in Guidebook 1. It provides guidance for preparing a Strategic Visioning Profile that will become the planning framework for your TimeBank (Guidebook 3), which in turn will be used to start and operate a TimeBank (Guidebook 4). Guidebook 5 addresses matters involving TimeBanking and advancing social change.

The basic idea of TimeBanking appears simple: For every hour you do something for someone else in the TimeBank with skills you have, you earn one Time Dollar. With the Time Dollars you earn, you are eligible to receive something someone else in the TimeBank can do for you. People do what they can for each other – the range of resource skills in the TimeBank depends on the members and their creativity.

Although TimeBanking looks simple, it is profound and the possibilities are limitless. Through the study of the Guidebook Series, you will see the extent to which TimeBanks vary, limited only by the broad range of ways that people can think of to help each other and to care for their community as a whole.

Welcome to TimeBanking. We are pleased you chose to vision about TimeBanking in your community with Guidebook 2. We hope you will find this an inspiring experience. We encourage you and your group will move through the whole series to create a TimeBank that is successful and makes you and your neighborhood proud.

TimeBanks USA is the hub of a network of independent Time Banks in the US and host of the International TimeBanks Conference which helps TimeBanks identify and share “what works” for TimeBanking. Working with TimeBanks here in the US and overseas, we have learned different ways of understanding and using Time Dollars and TimeBanking, especially in relation to social change.

This series draws upon the learning, sharing and contributions of TimeBanks around the US and the world. We are excited that you will be joining in.

Welcome to the wealth of TimeBanking!

TimeBanks USA, 5500 39th Street NW, Washington, DC 20015
Tel. 202-686-5200; www.timebanks.org
Overview of the Series

TimeBanking, as a movement, motivates and mobilizes groups of people to make better use of their time and skills to help each other. Each Neighborhood TimeBank forms networks of giving and receiving, with people helping each other meet their day-to-day needs and challenges in their own community. They use their own skills and time to provide essential, helping services to each other. TimeBanking also helps groups organize group events and projects for fellowship and to advocate for broader community interests and common welfare.

The Guidebook Series for Neighborhood TimeBanks is for interested persons and groups who want to learn about how to envision, start up and operate a TimeBank. Each Guidebook charts a distinct stage on the journey to a successful TimeBank:

- **Guidebook 1:** Exploring the Big Ideas of TimeBanking
- **Guidebook 2:** Strategic Visioning for a TimeBank in Your Community
- **Guidebook 3:** Planning for Your Time Bank
- **Guidebook 4:** Managing Your TimeBank
- **Guidebook 5:** Advanced TimeBanking

Each Guidebook represents a distinct stage in the formation and development of a TimeBank, dealing with key issues, considerations and changes for that phase, including:

- Knowledge: what you need to know to move forward with a TimeBank
- Vision: your ideas for the future of your TimeBank
- Action: what you can do to move forward with a TimeBank
- Teaming: involving and building commitment for your TimeBank

At the end of each stage, the group is asked to evaluate learning and value of the sessions and to decide if there is enough interest and commitment to move to the next level.

Leaders are encouraged to assess their experience with the Guidebooks and study process and advise TimeBanks USA about their assessment and whether or not they wish to proceed.

We hope this Guidebook will help you on your way to your own TimeBank and that you will join the world-wide TimeBanking network.
Guidebook 2:
Strategic Visioning
for a TimeBank in your Community

Introduction to Guidebook 2

Purpose and Objectives

The purpose of Guidebook 2 is to help develop and document a vision for your TimeBank. The vision will be recorded in a “Strategic Visioning Profile” which will include the important you have for your TimeBank:
- Why Create a TimeBank
- Who to Get Involved
- What a TimeBank Could Do
- How It Might Work

The specific objectives of Guidebook 2 for the team are:

- **Knowledge**: to learn more about your community, about what is involved in introducing TimeBanking and how it might work in your context.
- **Vision**: to formulate a shared vision for your TimeBank, its mission and what it will look like in your community.
- **Action**: to prepare a Strategic Visioning Profile and supporting information relevant to a framework for planning for a TimeBank in your community.
- **Mobilizing**: to engage the team for visioning, build their understanding and commitment, and initiate the planning process for creating a TimeBank.

Guidebook 2 is organized in three sections:

- **Team Preparation Meetings** – Team formation, building commitment and shared orientation for visioning  *(Chapters 1-3)*
- **TimeBank Visioning Meetings** – Developing the vision for your TimeBank  *(Chapters 4-5)*
- **Final Visioning Meetings** – Finalizing the Strategic Visioning Profile, affirming the vision and looking ahead  *(Chapter 6)*

Each group will plan and structure sessions to suit their needs, pacing and outcomes.
About the Strategic Visioning Team

Guidebook 2 builds on concepts of TimeBanking introduced in Guidebook 1 and assumes that the visioning team has completed that exploration stage.

Creating a TimeBank will require a team effort. This means committed persons who have relevant knowledge, information, contacts and experience for visioning, planning and starting the TimeBank.

Forming your planning team is the critical first step to prepare for visioning. The size of the visioning team will be determined by your circumstances. Your team may have as few as 3-4 persons or could be as large as 6-8 persons. The commitment, enthusiasm and integrity of the leadership will be key factors at this phase.

In preparing Guidebook 2, we have made the following assumptions about the visioning team:

- Members of the team are already familiar with TimeBanking, and have studied and discussed the materials in Guidebook 1 as a background for the team visioning assignment.
- Members of the team know each other sufficiently to quickly build the levels of trust, respect and cohesion necessary for proceeding with the visioning assignment.
- There will be members who have skills for team leadership and facilitation and are able to use and adapt the Guidebook materials to design and conduct meaningful meetings for the team and its situation.

About Strategic Visioning Meetings

- Members will appreciate productive, meaningful meetings – meetings they participate, learn and get things done. The Guidebook suggests content and activities for sessions which leaders can use to move the assignment forward.
- Remember, that process is as important as the content. Meetings should be conducted with clarity of purpose, agenda, methods and desired outcomes to be productive for the team and its members.
- Teamwork is key. Regular meetings, gatherings and events will become a normal part of your TimeBank. The visioning meetings begin to model and set norms so that TimeBanking meetings are productively used to bring people together for purposes of doing things that you can do better together than anyone one of the members could do alone.
The Wealth of Possibilities  Guidebook 2: Strategic Visioning for a TimeBank in Your Community  (Ver. 10.011)

About the Guidebook Materials

Each Chapter of the Guidebook includes:

- **Study Materials**: content in the text, organized by chapter and heading, on specific topics to with orientation, visioning and conduct of the meetings (note that the layout of the materials on topics is page-coordinated to allow for ease of copying pages as handouts for discussion);

- **Ideas for Activities**: suggested team exercises and activities for putting ideas and concepts introduced in study materials into action;

- **Quotations**: quotations associated with specific topics are highlighted in the text as inspiration and references that may be useful in discussing ideas and actions;

- **Ideas for Meetings and Facilitation**: suggestions for purposes, agendas, ideas and exercises that could be used for conducting the visioning meetings;

- **Notes of Session**: this suggests formats for Leaders to reflect on and summarize and evaluate outcomes of sessions and to use in planning the way;

- **Evaluation Form**: an Evaluation Form to be used after your final planning session to evaluate the value of the meetings and the progress of the group;

- **Resources**: DVD, CD and other resource materials that provide reference and living information to stimulate discussions and understanding;

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**Icon Code**

- 🔑 Opening the Meeting: Setting the right climate is a key to success
- ⚖️ Heart of the Session: Bringing topics alive with group sharing and learning
- 🌿 Topics and Exercises: Suggested team discussions and assignments
- 🏆 Achievement Activity: Practical tasks_applicable for TimeBanking
- ✝️ Summarizing & Looking Forward: Translating ideas into learning and action
- 📝 Assignments: Tasks or projects for members to do between sessions
- 🎥 DVD: Video resources for use in sessions
- 📚 Readings / Handouts provided for use in sessions
Guidebook 2: 
Vision a TimeBank for Your Community

SECTION A: 
PREPARING FOR STRATEGIC VISIONING

Chapter 1: Prepare for an Adventure

Chapter 2: The Importance of Strategic Vision for Your TimeBank

Chapter 3: Pre-Visioning Steps for Your Strategic Visioning Team
Chapter 1: Prepare for Adventure

1.1 Getting Ready for Adventure!

If you are thinking about starting a TimeBank, you already have some ideas of the possibilities. Which of these possibilities interest you? What other possibilities do you have in mind?

___ increase levels of interaction and mutual support among members
___ change and enrich the lives and possibilities for members
___ reweave relationships by sharing of commitments, resources and time
___ raise levels of well-being, respect, and social justice
___ transform the character of your community.

What other possibilities do you have in mind? Be as specific as possible.

__________________________________________________________________
__________________________________________________________________
__________________________________________________________________
__________________________________________________________________
__________________________________________________________________

We wish you all the best in the venture to realize these possibilities.

_This Guidebook is designed to help you get ready for the adventure of TimeBanking. Best Wishes!_
As you proceed, keep in mind that:

✧ TimeBanking is not a “prescription” — it involves ideas and practices that must be shaped to fit each situation.

✧ A TimeBank does not “self-ignite” — there must be champions to light and carry the torch.

✧ TimeBanks do not happen “automatically” — it takes people to make TimeBanking work.

✧ Creating a TimeBank does take a good deal of effort — that effort begins with your visioning team and what it is able to accomplish.

✧ Creating a TimeBank does involve significant change — and, as such will require deep commitment, competence, teamwork, desire for innovation, and risk-taking.

✧ Creating a TimeBank does require the proficiency and the spirit of successful entrepreneurs — talent, skill and ability combined with passion, enthusiasm and persistence.

✧ Creating a TimeBank does require innovation and adaptation to draw upon the realities and possibilities of the situation to inspire vision, inform planning and shape a TimeBank so that it is relevant and effective for its community and its circumstances.

There is a very real danger!

When one has a good idea, one often wants to put it into action quickly. However, remember that every venture requires some preparation. Actually, good preparation increases prospects for good results.

There are two critical activities that can be employed before jumping into action that will help achieve success, effective change and transition.

These are contemplation and preparation.

That is what “visioning” is about. It is a first planning step toward success — establishing focus and clarity of purpose and direction.

“Change is not merely necessary to life, it is life.”

Alvin Toffler
1.2 Your Adventure is Underway

**Good Luck! You are beginning an exciting, noble venture.**

Your adventure has already begun as you think about starting a TimeBank.
Be assured that the journey will be rewarding.
Also, be assured that it will be challenging.
Use this book to help understand what is required for success.

The introduction in *Guidebook 1* and in the essays of *Priceless Money* began your adventure with TimeBanking and its basic concepts.

☑ **TimeBanking:** Groups of people (and organizations) who form TimeBanks to help each other by giving and receiving support valued by hours of time, Time Dollars™, which create circular flows of time and relationships that rebuild and reweave community.

☑ **Core Economy:** Time Banking builds the *core economy* of family and community. With TimeBanking, everyone’s time is valued equally use their skills and gifts to create a circular flow of neighbors taking care of each other as an extended family.

☑ **Core Values:** Core Values are the “soul” of TimeBanking. They represent the qualities of highest significance and worth for TimeBanking. They are the priorities which form the driving forces and the basis for what a TimeBank strives to be and how members behave to each other.

☑ **Co-Production:** TimeBanking is relevant for service-oriented organizations. It uses co-production to help enlist, engage, empower and reward their ‘clients’ and members as ‘co-producers’ of desired services and outcomes – e.g., health, education, safety. Every one benefits more and higher goals are achieved.

*Guidebook 2, Visioning a TimeBank for Your Community*, introduces ideas, concepts and tools to help you move your ideas for a TimeBank forward toward realization.

We have designed the materials around four phases in the creation of a TimeBank.
The first is “exploration”, as noted above in Guidebook 1.
The second is “strategic visioning”, the focus of this Guidebook 2.
The third is “start-up planning”, the focus of Guidebook 3.
The fourth is “operations”, the focus of Guidebook 4.
1.3 “You Are Here”

Creating a TimeBank is a worthwhile venture that can transform your community. But, you are not yet ready to launch a TimeBank yet. Your adventure is just beginning. You are “Here”!

Growth and Maturity for Your TimeBank

Start-up and Pilot Operations

Start-up Plans for Your TimeBank

Strategic Visioning Profile for Your TimeBank

TimeBanking! WOW!!!

You Are Here

(Guidebook 1) - exploring -
(Guidebook 2) - visioning -
(Guidebook 3) - planning -
(Guidebook 4) - operating -
1.4 “Getting There” – Be a Learning Organization

A successful TimeBank must be a ‘learning organization” to succeed.

A learning organization benefits from vision, planning, action and learning.

- Vision sets the framework for planning.
- Planning sets the foundation for action.
- Action sets the context for learning.
- Learning informs vision, planning and action.

We call this the **TimeBank Guidance Cycle**.

TimeBank Guidance begins with **vision**, which is then defined into **plans**, which are executed as **actions**, which generate **learning**.

**Learning** creates opportunities for innovation and adaptation.

**Learning**, based on experience, then influences the re-shaping of **vision**, **plans** and **actions** and drives the TimeBanking visioning–learning cycle.

*Linking vision, planning and experience with learning gets positive results.*

*The Guidance Cycle is a good model for planning and managing a TimeBank.*

*Strategic visioning is a critical initial for successfully creating a TimeBank.*
1.5 Making Your TimeBank a Learning Organization

The fusion of vision, experience, action and learning enhances possibilities and success. It is important for your visioning team to:

- adopt a *learning orientation* to responsibly fulfill its visioning assignment, and
- envision your TimeBank as a *learning organization* from its conception.

Consider these measures to make your TimeBank a learning organization.

- Formally assign learning and adaptation as priority values for the TimeBank and make these essential aspects of the intended governance, management, social character and culture of your TimeBank.

- Model a learning culture with the visioning, planning and management teams as the core that builds the character of the TimeBank. Give consideration during visioning and planning to: What is needed for feedback, learning and adapting? How is that captured and analyzed? How is that evaluated, mobilized and used?

- Create a learning culture by finding ways to integrate intentional learning into the processes, performance and experiences of your TimeBank. This begins with leadership and is based on procedures related to communications, management and governance.

- Position your TimeBank to be sensitive to its members and to its environment so it is poised to adapt and perform appropriately. Find ways to make learning a team and organizational effort and ways to empower and reward learning and learners.

- Use intentional learning as an effective strategy for engaging leaders and members as learners in processes and for nurturing new skills, attitudes and ways of thinking. Intentional learning creates a culture of self-awareness, self-initiative, self-consciousness and self-evaluation which raises performance and standards of integrity at personal and organizational levels.

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Live as if you were to die tomorrow.  
Learn as if you were to live forever.  

Mahatma Ghandi
1.6 Team Formation and Orientation – Action Steps  
(Suggestions for Team Facilitation and Leadership)

1.6(a) Ideas for Opening Team Orientation Meeting

Welcome

- Welcoming statement.  
  (a) Explain that the purpose for coming together is to form a team that will shape a vision for creating a TimeBank in our community.  
  (b) Give a brief statement of background to the meeting, any relevant information, why persons were chosen, what you hope, etc.

- Purpose Statement (a suggestion)  
  Our purpose is to develop a clear vision for a TimeBank in our Community. We believe that this idea may be relevant to us, here in our community. We are coming together as a team to envision how TimeBanking can be adapted to our purposes for our community. The vision we develop will be used to promote our TimeBank and then to begin planning its start-up.

  In our first working sessions as a team, we will study the “TimeBank Un-Puzzle” and develop a plan of action for our strategic visioning exercise.

  We will then convene visioning meetings in which the “TimeBank Un-Puzzle” will be used to write a Strategic Visioning Profile for our TimeBank.

  In our final working sessions, we will review the completed Strategic Visioning Profile and agree on next steps forward for start-up planning of our TimeBank.

Focusing the Group (Use brief opening exercises to focus the group for each meeting.)

Introductions: Use an initial exercise for team members to introduce themselves and something meaningful about themselves. Consider a follow-up exercise which might be responses to questions such as:

- Why did you accept this invitation?
- How do you feel about this assignment and being on this team?
- What do you bring to this assignment and to the team?
- What will you depend on from others on the team

Consider a follow-up exercise, such as:

- What do you personally expect or hope of working with this team?
- How would like to be known or remembered on this team?
1.6(b)  Ideas for Video Resources

Video – TimeBanking Principles  by Edgar Cahn
(Use video resources for learning and discussion)

Suggested discussion topic:

*Why do you think a TimeBank is a good possibility for our community and what do you think a TimeBank can achieve?*

Allow a few moments to think, perhaps to make notes.

Ask each member to share thoughts about their responses to the question.

Lead a discussion about the responses. Note similarities and differences of responses and move toward agreements on general reasons, common themes and purposes for creating a TimeBank. (Also, keep in mind areas where there are differences as these may be of useful in discussions.)

Video – TimeBanks In Action  by TBUSA

Suggested discussion topic:

*What did you observe or learn that might be relevant to our community or to our TimeBank.*

*Any comments or observations you wish to share about why you’ve seen about TimeBanking?*

Allow a few moments to think, perhaps to make notes.

Ask members to share and discuss thoughts about their responses.
1.6(c) Ideas for Meeting Activities

TEAM ACTIVITY – TIMEBANKING POSSIBILITIES
Reference the TimeBanking Possibilities Worksheet (pp. 12-13)

+ Ask members to respond to the Possibilities Worksheet.
+ Allow time for members to share their responses and views about possibilities.
+ Use a discussion to build expanding view of possibilities. Do not try to force any consensus at this time.
+ Let the team reflect on how the discussion went and how they can strengthen their discussion and interactions.

Team Activity Exercise Core Values Game
Instructions from TBUSA’s Training and Orientation for TimeBanks
Core Values Game See Attachment 5 (pp 138-140)

TEAM ACTIVITY – PREPARING FOR ADVENTURE
Reference “You are Here” Worksheet (p. 15), Guidance Cycle (p. 16)

Explain that the team needs to have an understanding of where it is on the journey of establishing a TimeBank and what the journey will be. Reference the “You are Here” worksheet showing the phases of creating a TimeBank. Discuss for understanding.

Reference the TimeBank Guidance Cycle worksheet. See how the TimeBanking journey links vision, planning, action and learning in a cycle for innovation and change. Discuss for meaning.

Reference Making your TimeBank a Learning Organization” (p. 17). Emphasize and discuss the concept and importance of your TimeBank being a learning organization and your team having a learning orientation. Discuss what this means, in practice, for the team. Discuss what it will mean for the vision of your TimeBank.
TEAM ACTIVITY – TIMEBANK GUIDANCE CYCLE

TimeBank Guidance Cycle  (p. 16)

Explain that the team will now look at our views on the four aspects of the TimeBank Guidance Cycle and how it is relevant to our team. Distribute Handout and ask members to make notes on their ideas about the learning cycle and its relevant for the TimeBank you wish to create.

The responses will be used for discussion and to get a sense of the relevance for visioning and planning. It is important to share information and to note areas of commonality and areas of difference. It is not necessary to get full consensus, but it is important to get convergence of ideas. Try to get an understanding as these views will strongly influence the assumptions and design as planning moves forward.

TEAM ACTIVITY – TEAM PLANNING AND NORMS

Source materials on visioning and team formation

Explain that the team will be give attention to what it means to be a team and to reaching agreements on how the team will work and its norms.

Ask each person to reflect on “what do I bring to this team for this assignment”. Share and discuss.

Ask each person to reflect on “what do I look to for others as we do this assignment”. Share and discuss.

Use a team-building raise familiarity and identity as a visioning team and to agreements on:

- Commitment to visioning for a TimeBank
- Team roles and responsibilities
- Team norms and ways of working
- Meeting facilitation and documentation
- Other matters for team operations and effectiveness
Chapter 2:
The Importance of Strategic Vision for Your TimeBank

2.1 Strategic Vision Opens Possibilities for Your TimeBank

There are those that look at things the way they are, and ask, 'Why?' I dream of things that never were, and ask 'Why not?'

Robert F. Kennedy

Vision – powers of anticipating that which may come to be; vivid imaginative, anticipation, foresight; things anticipated and envisioned

Every TimeBank has started because someone had vision of a better future, a future where things were different, somehow better.

A good vision must be a more than a far away dream;
It must be a hope, but more than a hope, it must be an aspiration;
And more than aspiration, it must generate possibilities.

Strategic vision is about starting to make changes, changes that will make things better – that bring about possibilities for social change.

TimeBanking and Co-Production foster social change.

Strategic visioning aims to envision ambitious possibilities and sources of commitment for realizing those possibilities.

Strategic visioning is optimistic, but must be contoured by realities.

In Guidebook 2, we take the position that strategic visioning is the first step toward defining and setting the foundation for new possibilities,

Visioning is not wishful thinking about either the present or the future. Rather, it is a strategic step of shaping possibilities that can be achieved.

Visioning is not about shaping perfect or complete model for your TimeBank.

Strategic visioning is the beginning stage of an intentional learning process for understanding what is, what can be and ideas for your TimeBank.
2.2 Strategic Visioning Shapes a Character for Your TimeBank

Think of vision as a star shining in the night.  
A star inspires with its brilliance and sparkle.  
From afar, its form is neither distinct, nor clear;  
Yet its brightness attracts hopes and fuels dreams.

Strategic Visioning Defines the Heart and Mission of your TimeBank

✓ A good strategic vision is expansive and forward-thinking, giving hopes and aspirations for a better future.

✓ A good strategic vision focuses more on strengths and assets rather than problems, giving a positive direction and an affirmative place to start.

✓ A good strategic vision answers the questions, “What images are you hoping for and what are the purposes you pursue?”

✓ Strategic visioning defines the heart and mission for your TimeBank.

Strategic Visioning Helps Set Expectations

✓ Strategic visioning defines goals, directions and strategies for achieving desired results, setting up expectations for your TimeBank.

✓ A Strategic Vision will shape how others will view the TimeBank and what their expectations for it will be.

✓ A Strategic Vision is not a plan and does not delve into detail, but it does set the focus and framework for planning and later operations.

But, Strategic Vision will also be Dynamic

✓ Vision, like expectations, will be dynamic. Vision cannot be static.

✓ Vision will grow and change by gaining information and experience.
2.3 Strategic Visioning must be a Team Effort

Strategic visioning calls for imaging and describing the desired future and outcomes as vividly as possible.

Strategic vision is the critical initial focal point for shaping a TimeBank. Your TimeBank, like any organization, needs a *shared strategic vision*. The vision is not just for a few, it is for all who will be involved. Everyone is a ‘stakeholder’ in the vision and how it will be carried forward.

**Thus, strategic visioning must, first and foremost, be a team effort.**

**Put together the best team possible to define the vision.**

For some, visioning seems like an innate natural skill; For others, it is a challenging, learned skill. For all, visioning must be conscious and intentional. For all, it can be strengthened by experience and learning.

Selecting and getting the right people involved in the visioning team is a critical first step. Team members should include those who know the community and are known for their leadership and follow-through skills. They must have the spirit and energy to make things happen. Vision begins a process that takes planning, follow-through and hard work.

It is assumed that your visioning team will have had the benefit of studying and experiencing *Guidebook 1*. If so, the team should affirm a shared understanding of and its initial commitment to TimeBanking.

Your team can use the visioning process to create team characteristics that will facilitate its success:

- Group familiarity, respect and shared norms
- Sharing of information, opinions and perspectives
- Acceptance of a facilitated group process
- Commitment to shared values
- Focus on creating a Strategic Vision Profile

*Imagination is the beginning of creation. You imagine what you desire; you will what you imagine, and, at last, you create what you will.*

*George Bernard Shaw*
2.4 Team-Building for Strategic Visioning

The visioning team must believe that their work is important. They must also believe in themselves. The team needs to invest in itself as a necessary condition to be able to carry out their visioning assignment.

It is important do team-building so that team members have a shared sense of who they are, what they will do, and how they will work.

First, it is assumed that all members of the team will be familiar with the basic concepts and practices of TimeBanking by having experienced the study of Guidebook 1 or through similar opportunities. If not, it will be important to gain that knowledge before proceeding to visioning.

Second, it is recommended that every visioning team dedicate time to team-building and team planning. At a minimum, it is suggested that the team take time to discuss:

- **Familiarity:** getting to know each other, personally and professionally, what each member brings to the assignment, and what members expect or need from each other
- **Information:** sharing and seeking information and views about their interests and hopes about TimeBanking and
- **Commitment to Shared Goals:** affirming individual and team commitment to and sharing understandings of objectives and likely plans for doing the visioning assignment
- **Teamwork and Collaboration:** how to work together and make progress, including discussion, information sharing, decision-making, written products, communication and norms
- **Roles and Responsibilities:** how to fulfill roles of team members such as facilitating meetings, documentation, communications, etc.

To become a team, a group of individuals need to have a sufficient sense of shared values and common goals. Composition is important. Members must have relevant knowledge, skills and abilities to do strategic visioning.
Members must also have sufficient desire (values and goals) to get the assignment done well.

The most critical factors for members of the team are (a) skills and tools to contribute, (b) desire to achieve the goals, and (c) collaborative attitudes.

Never doubt that a small group of thoughtful, committed people can change the world. Indeed, it is the only thing that ever has.

Teams go through both predictable and unpredictable processes. Predictable processes include, for example, conventional ways of describing stages of team dynamics, such as:

**Forming:** This is a stage of coming together as a team to articulate (or reaffirm) goals and relationships while establishing (or re-establishing) structure, processes, roles and leadership.

**Storming:** This is a stage (often inevitable) of turmoil and turbulence as questions arise about goals, relationships, leadership, accountability, processes, etc. There may be discord and discomfort as members learn about how they are (or are not) working together and try in different ways to achieve resolution.

**Norming:** This is a stage of alignment and convergence as team reach agreement on goals, structure, processes, format, relationships, etc. It is characterized by cooperation, accord, harmony and mutual support. Clarity of norms help the team compensate and leverage strengths and weaknesses, agreements and differences toward the common goals.

**Performing:** This is the period of accomplishment, achievement, productivity and results, as well as pride in the team and its work as goals are reached.

**Adjourning or Transition:** This is the stage of closure for its common goal(s) and disbands or perhaps transitions into a new phase of activities and assignments with corresponding goals and membership.

Unpredictable processes involve the variable dynamics arising from personal and group ways that members deal with time, differences, opinions, productivity and harmony. It is often important to dedicate time for team spirit and dynamics as well as to structure and task to ensure the team is able to manage unpredictable processes, too.
Effective leaders find ways to optimize teamwork and maximize team achievement, by promoting productive dialogue, encouraging team spirit and maintaining focus on team and task. Some ideas that are useful include:

- Encourage all members to participate and contribute as the team adopts and works to achieve its common goals.
- Make clear distinction between generating ideas and evaluating or assessing ideas. Divide these processes with appropriate norms so members and ideas are not discouraged or stifled.
- Do not dominate discussion. Do not make a practice of responding to each participation or idea. Rather, find ways to elicit ideas and contributions of others.
- Keep the team mindful of purpose and be forward-looking for achieving goals.

### 2.5 The Team Assignment – A “Strategic Visioning Profile”

Vision reaches beyond the thing that is, into the conception of what can be. Imagination gives you the picture. Vision gives you the impulse to make the picture your own.”

Robert Collier

Your assignment is to write a “Strategic Visioning Profile” for your TimeBank. This is a brief document that outlines the most important ideas and critical ideas in a way that is visionary, inspiring and promotes the ideas and benefits of a TimeBank for your community. This is discussed in detail in Chapters 4, 5 & 6.

The Strategic Visioning Profile will have two primary formal uses:

a) communicating and publicizing ideas for a TimeBank, and

b) use as a framework for planning and launching your TimeBank.

The clarity and inspiration of the Strategic Visioning Profile set standards for the planning that will follow and for the effectiveness of your TimeBank when it is launched. It must be:

- visionary and insightful
- inspirational and interesting
- clear and informative
- optimistic and reasonably realistic
2.6 Team Formation and Planning – Action Steps  
(Suggestions for Team Facilitation and Leadership)

TEAM ACTIVITY – TEAM PLANNING AND NORMS

Reference team building (p. 25)
Use external materials on visioning and team formation

Explain that the team will now look at what it means to be a team and reach agreements on how the team will work and its norms. Use a team-building activity to raise familiarity and identity as a visioning team and to agreements on:

- Understanding of the visioning assignment
- Team roles and responsibilities
- Team norms and ways of working
- Meeting facilitation and documentation

TEAM ACTIVITY – MEETING MANAGEMENT & ROLES

Roles to Keep in Mind

Team leaders should not be expected to be the resident “expert” on TimeBanking. Rather, leaders are responsible for facilitating a visioning and learning process. Responsibility for meetings is shared by the whole team. Key leadership and facilitation roles must be performed, such as:

i) Planning for meetings and being prepared to use time well;

ii) convening the meetings and make sure the arrangements are satisfactory;

iii) managing the meetings, keeping meetings on time and the group on track;

iv) facilitating discussions and helping the team share views and ideas, as well as expressing understandings with each other;

v) completing the assignments for each session as steps toward the final product of a Strategic Visioning Profile for your TimeBank;

vi) bringing closure by summarizing the meeting and looking for decisions or actions that will bridge to the next meeting and the way forward.

Discuss how roles can be shared among team members as seems appropriate and effective for the group. For example, it may be a good idea to have different persons to as ‘time manager’ for different meetings to help you keep the meeting on schedule, as necessary.
TEAM ACTIVITY – TEAM BUILDING EXERCISE(S)

Source other materials on team building

It is suggested that team-building exercises be used to strengthen the team and its working together for TimeBank Visioning. There are a wide variety of exercises available. The following illustrates a team building activity:

Create ‘fill-in-the-blank’ cards.

Have members complete the cards.

Share information by reading responses to the questions aloud.

Discuss the responses.

Ask team to reach agreement on responses they feel relevant for this team for this task.

| 1. The benefits of working as a team are: |
| 2. Reasons a team make sense for this assignment is: |
| 3. For our team to work well, members must: |
| 4. Among the things that weakens a team are: |
| 5. A key factor for a team’s success is: |
| 6. For our team to work well, members must agree to: |
| 7. An important indicator of our team effectiveness is: |

TEAM ACTIVITY – UNDERSTANDING THE ASSIGNMENT

A STRATEGIC VISIONING PROFILE

Discuss and get a shared understanding of:

a) the value and importance of visioning
b) the team assignment – a Strategic Visioning Profile

Emphasize that the Strategic Visioning Profile will be brief working document that aims to outline important ideas and critical ideas for your TimeBank.

Note that the team will use the Strategic Visioning Profile to prepare several other key working papers, e.g., Mission Statement, draft brochure, planning issues, research agenda, next steps, etc.

The Strategic Visioning Profile will have two primary uses: (a) communicating and publicizing ideas for a TimeBank and (b) a framework for planning and then launching your TimeBank. It must be:

+ visionary and insightful
+ inspirational and interesting
+ clear and informative
+ reasonably realistic
Chapter 3: Pre-Visioning Steps For Your Team

These pre-visioning steps will help build shared understandings of the context and conditions affecting the vision for a TimeBank.

3.1 Preparation Step 1: Affirm the Core Values

Affirmation of Core Values is essential for an effective TimeBank. Core Values bring people together in new ways form to build relationships. All members of your visioning team should have understanding of the importance and relevance of the TimeBanking core values. Core values will impact every aspect of your TimeBank. So, they must be central to your vision for your TimeBank.

Five Core Values of TimeBanking

TimeBanking changes lives, reweaves community, enlivens organizations and improves social systems. Substantive change comes from practice of the Core Values

**Assets Perspective**

*We are all assets.* Every human being has something to contribute.

**Redefining Work**

*Some work is beyond price.* Work is redefined to value, honor, record and reward whatever it takes to raise healthy children, build strong families, revitalize neighborhoods, make democracy work, advance social justice and make the planet sustainable.

**Reciprocity**

*Helping works better as a two-way street.* The question: ‘How can I help you?’ must be changed to ask: ‘How can we help each other build the world we both will live in?’

**Social Networks**

*We need each other.* People helping each other reweave communities of support, strength and trust. Community is built upon roots, trust, and networks of mutual respect and commitment.

**Respect**

*Respect demands accountability:* The voices of all must be heard and heeded toward the aims of promoting social justices and compelling accountability.
Core Values are ultimately significant for the culture of your TimeBank.

Core Values set the intent and direction for your TimeBank.
They shape the mission and vision.
They form the central purposes to be pursued.
Core Values are the framework for strategic planning.
They determine expectations, norms, roles and rewards.
They set the primary priorities and motivate members.

Affirming and adapting TimeBanking’s core values to your situation for your TimeBank creates the foundation upon which you will build.

Understanding core values lets everyone understand what a TimeBank is about and know how they can contribute.
- What do they mean for your and your team?
- How will they be put into practice in your TimeBank?
- How will they be built into the design and plans?
- How will they be acted out in the work, behaviors, decisions?

Keeping the core values in mind will help your team:
- Shape the vision, image and identity for your TimeBank.
- Shape and sustain the culture for your TimeBank.
- Be built into the design for your TimeBank.
- Motivate recruitment of members and leaders of the TimeBank.

Reference Team Activity 1 (p.41)

Allow time for the visioning team to:

✔ Affirm their understanding of the core values and their commitment to seeing them as critical for your TimeBank – and creating their own statement of values as an important step in the planning process.

✔ Discuss and share your theoretical and practical interpretations of the core values. Look at what these mean in daily lives. Explore how these apply personally and for the community.

✔ Note similarities and differences among members and discuss what these may mean. Reach an understanding of core values.

✔ Consider how core values will be embodied and enacted in your TimeBank and how to reinforce them in visioning and planning.
3.2 Preparation Step 2: Pre-Visioning Desired Futures

(Reference Team Activity 2 on p. 41)

People unite around things they truly care about. The core values promote positive social interactions and patterns which people, communities and organizations can adopt TimeBanking to help create a better future.

Origins of a vision for a TimeBank are found in what people in your community truly care about and the future they desire. Your team is a select focus group to perceive and begin setting a vision for the broader context of your community.

Use a Visioning Exercise to focus the team on the broader picture of your organization and/or community. The following ideas are suggested ideas to illustrate this type of exercise.

**A. Desired Community Characteristics.** Get a sense of a desired future that people have for your community by identifying qualities related to community characteristics.

+ Brainstorm desired community characteristics, such as those promoted by TimeBanking which are illustrated below.

<table>
<thead>
<tr>
<th>Characteristics</th>
<th>Desired Qualities/Features/Elements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vibrant Core Economy</td>
<td></td>
</tr>
<tr>
<td>High Social Well-being</td>
<td></td>
</tr>
<tr>
<td>Positive Community Identity</td>
<td></td>
</tr>
<tr>
<td>Social Justice</td>
<td></td>
</tr>
<tr>
<td>Rights and Advocacy</td>
<td></td>
</tr>
</tbody>
</table>

+ Allow time for individual reflection and note-making of responses.

+ Group discussion: Share individual responses in the group and discuss for comparison, contrast, special interests and common themes.

+ Summarizing/Synthesizing: Explore and seek a sense of agreement about qualities/features/elements in which members have high interest and about which they truly care.

+ Projection: Ask members to consider how others in their community (organization) would receive these as themes or qualities in a vision.
B. **TimeBanking Core Values.** An alternative of the same exercise could use the TimeBanking Core Values to shape a picture of the desired future that people may have for your community by using a variation of the working chart.

<table>
<thead>
<tr>
<th>Core Values</th>
<th>Desired Community and Social Features, Patterns and Social Interactions – What this would look like.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assets Perspective</td>
<td></td>
</tr>
<tr>
<td>Refining Work</td>
<td></td>
</tr>
<tr>
<td>Reciprocity</td>
<td></td>
</tr>
<tr>
<td>Social Networks</td>
<td></td>
</tr>
<tr>
<td>Respect</td>
<td></td>
</tr>
</tbody>
</table>

Use the same sequence of brainstorming, individual responses, sharing, summarizing/synthesizing, and projection.

C. **Questions for visioning scenario.** Get a sense of a desired future that people may have for your community by using a set of visioning questions that are meaningful for your situation, organization and/or community. The questions can be forward-looking but specific enough to capture conditions of concern. Examples might include:

- If, eight-ten years from now, you and your loved ones were still engaged in this (organization, community), what would wish it to be like.
- What do you and others most value about this (organization, community) that should be sustained and carried forward?
- What about the (organization, community) are things of concern and need to be changed?
- Are there things that you think can be and should be improved about our (organization, community) at this time?
- What trends or patterns of this (organization, community) do you think should be protected and sustained? What to be changed?

Use the sequence of group discussion steps as noted for previous examples.

D. **Personal scenarios for visioning.** Get a sense of a desired future that people may have for your community by using specific assignment to elicit personal responses such as: (a) write a letter to an imaginary friend/youth about they future they want to see for them ten years from now, or (b) create images of the future you would like to see for our community in ten years.

Use the sequence of group discussion steps as noted for previous examples.
### 3.3 Preparation Step 3: Appraising Need and Possibilities for TimeBanking in Your Community

#### Community Well-Being Appraisal

Are you seeking to build a stronger sense of community?

Take and score this short quiz to appraise needs and possibilities for a TimeBank in your community.

Rank your responses on a scale of **+10** (positive) to **−10** (negative), as illustrated by scale below

<table>
<thead>
<tr>
<th>Score</th>
<th>Definitely</th>
<th>Mostly</th>
<th>Sometimes</th>
<th>Mostly but seldom</th>
<th>Mostly</th>
<th>Almost</th>
</tr>
</thead>
<tbody>
<tr>
<td>+10</td>
<td>Yes</td>
<td>Yes</td>
<td>0</td>
<td>-5</td>
<td>-10</td>
<td></td>
</tr>
<tr>
<td>+5</td>
<td>Rarely</td>
<td>Rarely</td>
<td>Not</td>
<td>Never</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Community Well-Being Appraisal

<table>
<thead>
<tr>
<th>1) Do members of your community know each other and help each other out with small tasks?</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>2) Is there a strong sense of trust and do people relate well to each other in your community?</td>
<td>Score</td>
</tr>
<tr>
<td>3) Do individuals in the community know the things they can do for one another?</td>
<td>Score</td>
</tr>
<tr>
<td>4) Is there a way of offering help without invading the privacy of others?</td>
<td>Score</td>
</tr>
<tr>
<td>5) Do people know the good things about others in the community?</td>
<td>Score</td>
</tr>
<tr>
<td>6) Is it easy for members of the community to ask for help without feeling awkward?</td>
<td>Score</td>
</tr>
<tr>
<td>7) Are there ways for community members to be protected from open-ended commitments?</td>
<td>Score</td>
</tr>
<tr>
<td>8) Can people be assured that their generosity won’t be taken advantage of?</td>
<td>Score</td>
</tr>
<tr>
<td>9) Are there social events that bring the community together?</td>
<td>Score</td>
</tr>
<tr>
<td>10) Is there a sense of continuity in the community, with people staying a long time and getting to know one another?</td>
<td>Score</td>
</tr>
</tbody>
</table>

**Total Score**
Reference Team Activity 3 (p. 42)

**What’s the score?**

Are there lots of “definitely yes” and “mostly yes” responses?
Are nearly all of the responses mostly positive?
Is the overall score greater than “75”? What does this mean?

If your responses are mostly positive, your community is very strong.
In this case, a TimeBank will provide opportunities for exploring, building and creating greater vitality in your community in new and innovative ways.

Are there too many “mostly not” and “almost never” responses?
Are more than half of the responses neutral or negative?
Is the overall score less than “75”? What does this mean?

If the responses are mostly neutral or negative, your community is weaker than it can be and its well-being scoring is low.
In this case, a TimeBank can help make all the difference in what your community is and for members of your community.
A TimeBank will help build relationships, trust, sense of community and excitement and wellbeing for your community and its people.

**Your Analysis of Community Well-Being Appraisal**
3.4 Preparation Step 4: Appraising Needs and Possibilities for Co-Production in your Organization

**Organization Co-Production Appraisal**

Are you seeking to help your organization better achieve its mission and build community at the same time?

Take and score this short quiz to appraise needs and possibilities for a Co-Production in your organization and with your community.

Rank your responses on a scale of $+10$ (positive) to $-10$ (negative), as illustrated by scale below

<table>
<thead>
<tr>
<th>Score</th>
<th>Definitely</th>
<th>Mostly</th>
<th>Sometimes</th>
<th>Mostly</th>
<th>Almost</th>
</tr>
</thead>
<tbody>
<tr>
<td>+10</td>
<td>Yes</td>
<td>Yes</td>
<td>Sometimes</td>
<td>Mostly</td>
<td>Almost</td>
</tr>
<tr>
<td>+5</td>
<td>Yes</td>
<td>Yes</td>
<td>Sometimes</td>
<td>Mostly</td>
<td>Almost</td>
</tr>
<tr>
<td>0</td>
<td>Occasionally</td>
<td>Not</td>
<td>Never</td>
<td>Not</td>
<td>Never</td>
</tr>
<tr>
<td>-5</td>
<td>Mostly</td>
<td>Mostly</td>
<td>Mostly</td>
<td>Mostly</td>
<td>Almost</td>
</tr>
<tr>
<td>-10</td>
<td>Almost</td>
<td>Almost</td>
<td>Almost</td>
<td>Almost</td>
<td>Almost</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Co-Production Possibilities Appraisal</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) Does your organization need to and want to actively engage your clients?</td>
<td></td>
</tr>
<tr>
<td>2) Would it help if your clients were members of a community-based support network where they can be linked with and have access to others who can help and support?</td>
<td></td>
</tr>
<tr>
<td>3) Do staff become excited and energized when clients become actively engaged in securing your organization’s mission?</td>
<td></td>
</tr>
<tr>
<td>4) Would it help to have clients partner with your organization to achieve desired results and change?</td>
<td></td>
</tr>
<tr>
<td>5) Do you need information and insights that can only be provided by your clients?</td>
<td></td>
</tr>
<tr>
<td>6) Do you need to build a constituency that will actively stand up and speak out for your organization, its mission and efforts?</td>
<td></td>
</tr>
<tr>
<td>7) Does peer involvement get mentioned as a ‘best practice’ or ‘good strategy’ in your field and is it considered by your organization.</td>
<td></td>
</tr>
<tr>
<td>8) Would asset-mapping help to learn about your clients and identify an inventory of under-used skills and resources in the community that are relevant for your organization’s mission?</td>
<td></td>
</tr>
<tr>
<td>9) Does your organization sponsor, support or engage in social and community events that bring people and clients together?</td>
<td></td>
</tr>
<tr>
<td>10) Is there a sense of continuity of relationship and support of your organization with clients, people and the community?</td>
<td></td>
</tr>
</tbody>
</table>

**Total Score**
Reference Team Activity 4 (p. 42)

**What’s the score?**

Are there lots of “definitely yes” and “mostly yes” responses?
Are nearly all of the responses mostly positive?
Is the overall score greater than “75”? What does this mean?

If you responses are mostly positive, your community is very strong. In this case, use of Co-Production and TimeBanking will provide opportunities for exploring, building and creating new, innovative ways for helping your organization link with and relate to your clients and their community.

Are there too many “mostly not” and “almost never” response?
Are more than half of the responses neutral or negative?
Is the overall score less than “75”? What does this mean?

If the responses are mostly neutral or negative, the involvement of your clients and their active relationship with your organization is less productive than possible. In this case, Co-Production and TimeBanking can help make a significant difference in boosting your organization, promoting its mission and building relationships with clients and community. Co-Production and TimeBanking will help build relationships, trust, sense of working together with clients and the community. This will benefit your organization as well as clients and community.

**Your Analysis of Organization Co-Production Appraisal**

_____________________________________________________________

_____________________________________________________________

_____________________________________________________________

_____________________________________________________________

_____________________________________________________________

_____________________________________________________________
3.5 Preparation Step 5: Checking Initial Assumptions

Reference Team Activity 5 (p. 43)

Leaders establish the vision for the future and set the strategy for getting there; they cause change. They motivate and inspire others to go in the right direction and they, along with everyone else, sacrifice to get there.”

John Kotter

Appraisals of needs and possibilities for TimeBanking and Co-Production, as in the quizzes above, set a base for considering creating a TimeBank. It is important to have converging ways of talking about your TimeBank.

The visioning exercise will help you define and clarify your ideas. It helps to have vision that can be clearly and consistently used to communicate your ideas to others.

You may already have some images of what a TimeBank could do and what it might look like. These may be reflected in an “elevator speech” that you use to talk to others and to recruit members to the visioning team. These images embody your initial assumptions.

What Type of TimeBank

TimeBanks can take on many different forms. The form you have in mind will be a key factor for visioning and planning. What is the nature of a TimeBank that you have in mind? For example:

- **Friends TimeBanks** – up to 35-50 people who generally know each other well
- **Neighborhood TimeBanks** - 100-150 members who live in the same community or vicinity
- **School or Church based TimeBanks** – members of an existing organization use a Time Bank to better achieve their mission and weave a tighter community
- **Social Service Agency based TimeBanks** – agency-sponsored where clients become active participants and lives are transformed through mutual support.
- **Integrated Community-Social Services TimeBank** – community and social services united by umbrella TimeBank for linking multiple functions and facets. (See Attachment 3.)
The images you already have will give some sense of what you want your TimeBank will be. Behind these images, there are numerous assumptions – why you want to start a TimeBank, what it will do, who it will serve, how big it will start and what it will become …

**Until we can understand the assumptions in which we are drenched, we cannot know ourselves.**

Adrienne Rich

Share within your team the any images and ‘initial assumptions’ that may form a “soft” backdrop to the visioning you will undertake. See to what extent you have similar or different ideas about key characteristics, for example:

**Starting Size:** An intention to start small, for example, makes planning assumptions different from an intention to start large. Size is important because it affects all other aspects of your vision and plans such as design, financing, recruitment, etc.

**Scope of Services:** A TimeBank with relatively limited scope and services will begin with relatively minimal small administrative demands because of limited numbers of functions and exchanges and fewer demands for support, compared to a TimeBank with a larger and more complex scope of services.

**Methods:** A TimeBank that focuses on neighbor-to-neighbor exchanges will be more direct and require less organizational sophistication than one that is integrated into an existing organization with specialized functions.

**Design:** A TimeBank that remains small may not require much formal structure or legal status for start-up, so it will be easier to plan and start than one that demands more attention to design and legal matters from the beginning.

**Costs:** A small TimeBank requires less start-up funding, so strategies for financing and levels of financing (and supporting documentation) are less than that required for a large TimeBank.
Name for Your TimeBank  (Reference Team Activity 6 – p. 43)

The name of your TimeBank will be an important part of its identity and image. This will be an important decision, if it is not already made.

It may be early to make a final decision, but it is not too early to think of possible names and what criteria to use to select a name.

Take some time for members to think about and discuss potential names. Discuss the reasons behind the suggested names and what they portray.

Do not rush into a decision. But, do choose an “interim name” for the moment. Use the ‘interim name’ until there is agreement on the name for your TimeBank.

Be Willing to Challenge and Change Your Assumptions

Conduct discussion on assumptions as a team activity.
Use Team Activity 7, p. 44 to consider implications of assumptions.

Begin challenging your own assumptions. Your assumptions are your windows on the world. Scrub them off every once in while, or the light won't come in.

Issac Asimov

This discussion of assumptions is for sharing information. This opens the door for visioning exercise in the next meeting(s). As you proceed, you must be willing to identify, question and redefine your initial assumptions. Be ready to clarify and challenge them in light of new information and analysis.

- Initial assumptions have considerable influence on the vision and planning for your TimeBank;
- Initial assumptions may both stimulate and limit creativity and innovative thinking about possibilities for your TimeBank; and
- Although they factor into the vision, they are not sufficient to be a complete vision for your TimeBank.

Consider how this discussion of assumptions affects your version of an ‘elevator speech’ for when you talk with others about TimeBanking.

Visioning is intended to help you challenge, clarify and construct sets of assumptions that help ensure that your vision and your planning are more realistic and useful for starting your TimeBank.
3.6 Pre-Visioning Exercises – Action Steps
(Suggestions for Team Facilitation and Leadership)

TEAM ACTIVITY 1 – AFFIRM CORE VALUES
Core Values Worksheet (pp. 30-31)

Encourage discussion of the core values as a step toward understanding and affirmation. The exercise might be designed in different ways, such as:

- Ask members to select a core value that is a priority for them and talk about why it is important and how that core value is relevant to the community or organization.
- Talk about each core value and discuss how it is relevant to what is happening and what could happen in the community or organization.
- Ask members to select one or more core values and how these are part of the way they live or the way they want to live.

Follow the responses with a discussion of the set of core values and then ask if there is affirmation of the core values as a step toward proceeding with visioning. Discuss and reach consensus on affirmation of values.

TEAM ACTIVITY 2 – PRE-VISIONING DESIRED FUTURES
Pre-Visioning Worksheet (pp. 32-33)

In preparation for this activity:
- draw upon materials in Guidebook 1 to develop a brief opening statement on core values and desired community characteristics.
- develop a set of future-visioning questions to use.
- decide on a scenario to use for instructions to begin the exercise.

Allow time for members to respond to the instructions.
Ask members to share their responses and reflections.
Allow time to discuss, compare and contrast the responses.
Find common themes, interests and assess strength of these for the group.
Record a list that can be used for later reference.
TEAM ACTIVITY 3 – COMMUNITY APPRAISAL
Community Appraisal Worksheet (pp 34-35)

Explain that the team will now look at perceptions of your community from the perspective of TimeBanking and conduct a preliminary audit that can help the visioning process. Distribute Worksheet and ask members to respond to the questions, record their scores and make notes on their ideas about the community appraisal and its relevant for the TimeBank you wish to create.

The responses will be used for discussion and to get a sense of the relevance of this community information for visioning and planning. It is important to share information and to note areas of commonality and areas of difference. It is not necessary to get full consensus, but it is important to get convergence of ideas. Try to get an understanding as these views will strongly influence the assumptions and design as planning moves forward.

TEAM ACTIVITY 4 – CO-PRODUCTION APPRAISAL
Co-Production Appraisal Worksheet (pp. 36-37)

Explain that the team will now look at perceptions of your co-production in your organization and community from the perspective of TimeBanking and conduct a preliminary co-production audit that can help the visioning process. Distribute Worksheet and ask members to respond to the questions, record scores and make notes about the co-production appraisal and its relevance for the TimeBank you wish to create.

The responses will be used for discussion and to get a sense of the relevance for visioning and planning. It is important to share information and to note areas of commonality and areas of difference. It is not necessary to get full consensus, but it is important to get convergence of ideas. Try to get an understanding as these views will strongly influence the assumptions and design as planning moves forward.
TEAM ACTIVITY 5 – CHECK INITIAL ASSUMPTIONS

TimeBank Initial Assumptions (pp. 38-39)

Explain that the team will now look at some assumptions they may already have about a creating a TimeBank. The purpose is to express and share these assumptions with each other so they are explicit and we can sense influence they will have on the team during the visioning process. The intent is to loosen the hold of any assumptions so that is flexibility and creativity to free up innovation and adaptation of ideas during the visioning exercises. Distribute information about assumptions and ask members to make notes on their ideas about their assumptions and the assumptions they hear from others as the team discusses initial assumptions.

The responses will be used for discussion and to get a sense of the relevance of any of the assumptions for visioning and planning. It is important to share information and to note areas of commonality and areas of difference. It is not necessary to get full consensus, but it is important to get convergence of ideas. Try to get an understanding as these views will strongly influence the assumptions and design as planning moves forward.

TEAM ACTIVITY 6 – NAME YOUR TIMEBANK (p. 40)

The name of your TimeBank will be an important part of its identity and image. This will be an important decision, if it is not already made. It may be early to make a final decision, but it is not too early to think of names.

Take some time for members to think of names (and write them down), then share the names and discuss the reasons behind the suggested names and what they portray.

Do not rush into a decision. But, do choose an “interim name” for the moment. Use the ‘interim name’ until there is agreement on the name for your TimeBank.
TEAM ACTIVITY 7 – ELEVATOR SPEECH

Elevator Speech. Ask members to do an “elevator speech” about the new TimeBank. (See “Sample TimeBank Elevator Speech”, Chapter 8, Section 8.3, in Guidebook 1.)

Suggested question: Tomorrow you will meet someone at the grocery store and you would like to share the idea of a TimeBank with them and get their reaction. You have a very limited time, as if it is like the time of riding in an elevator. You have one minute only. What can you say about the TimeBank we want to create?

Individual Elevator Speeches: Have each participant give an “elevator speech” about TimeBanking. Ask everyone to listen well and be prepared to discuss the speeches.

Ask for comments and discuss important perceptions and opinions raised.

Group Elevator Speech: Brainstorming: Ask the group to brainstorm their ideas for an elevator speech. Keep a list of the ideas.

Discuss how these ideas can be combined into a common ‘elevator speech’ that the group might like to use.

Note: The Team will revisit the matter of an ‘elevator speech’ after completing the Strategic Visioning Profile, so any new ideas are brought into it.

TEAM ACTIVITY 8 – RECORDING TIMEBANK EXCHANGES

TimeBank Software Community Weaver

Community Weaver Demonstration (CD from TBUSA)

The CD demonstrates how Community Weaver is used to facilitate and record requests and exchanges. Discuss the functions and value of using Community Weaver software for your TimeBank. Identify any strategic considerations or concerns (e.g., technology, equipment and training) related to the use of Community Weaver that need attention at this time.
3.7 Ideas for Closing Pre-Visioning Meeting(s): Ideas for Summarizing and Next Steps

**Summarizing and Looking Forward**

**Summarizing and Interpreting** (15 – 20 minutes)

+ Questions: Ask for questions about the paradigm. Set the stage for beginning the planning exercise.

+ Transition to Element Planning: Your team has now been introduced to a comprehensive set of documentation that will be required for your TimeBank. You are now ready to move into planning your TimeBank Profile.

Suggested Discussion Questions

- Has this meeting moved us toward a shared understanding of ourselves as a team – who we are and why we are working together? What are the important things for us to remember as a team?

- Do we have adequate commitment for working together on this assignment? Does it appear that we will be able to do this assignment? Should we consider any other members to join the team?

- Do we appear to have a sufficient understanding of TimeBanking at this time to move forward? Are there things that we should consider at the next meeting?

- Are there things that anyone would like to draw to the attention of the team at this time because they seem particularly relevant to you? To our community? Why? How?

- How do you feel about the meeting? What has been meaningful for you?

- What thoughts or ideas do you value and/or may wish to pursue further?

(Note: Record a list of “points to remember” for reference at future meetings.)

**Decision – Next Visioning Meetings**

*Decide on timing and assignments for next meeting(s)*

**Assignments**

1) Talk to others about TimeBanking and bring your learning to next meetings.

2) Consider important aspects of vision, strategy, tactics and evaluation and how these may affect the design of the TimeBank. Be ready to discuss at next meeting.

3) Introduce the idea of ‘Random Acts of Kindness’ and ask members to practice some ‘random acts of kindness’ before next session and be ready to discuss.
3.8 Notes and Evaluation of Orientation & Pre-visioning Meetings

(Section A)

Regarding the key concepts and practices of TimeBanking and Co-Production

Regarding the formation and commitment of the Planning Team

Regarding the community and any initial assumptions for the TimeBank

Regarding any other ideas and topics generated by the group.
Notes and Evaluation of Orientation and Pre-Visioning Meeting(s) (Section A)

Effectiveness of the meeting

levels of interest and involvement,

* demonstration of understanding,

* signs of commitment to move forward

* any points of significance.

*** *** *** *** *** *** *** *** *** *** *** *** ***

Overall evaluation of this meeting: Excellent Satisfactory Needs Improvement Other

Comments:

Assess your group’s interest at this time: None Low Moderate Potential Strong

a) Knowledge: understanding of TimeBanking
b) Vision: ideas for using TimeBanking
c) Action: willingness to plan for TimeBanking
d) Mobilizing: engaging in planning team
Guidebook 2: Vision a TimeBank for Your Community

SECTION B: STRATEGIC VISIONING FOR YOUR TIMEBANK

- STUDY MATERIALS -

Chapter 4: The “TimeBank Un-Puzzle”

Chapter 5: Prepare a Strategic Vision For Your TimeBank
Chapter 4:
The “TimeBank Un-Puzzle”

4.1 Pieces of the “Un-Puzzle”

You may already have ideas about many different aspects of your proposed TimeBank, for example:

✓ Why you want to start a TimeBank.
✓ Who could be interested and involved.
✓ What will it take in terms of effort and finance.
✓ Where will it be located and how it could be set-up.

These are critical pieces of a puzzle for visioning and planning a TimeBank.

One set of questions is: “How do these different pieces fit together?”
A second set of question is: “Have we thought of all that is needed?” And, “What else must be considered for visioning?”

A third set of questions is: “What needs to be considered for each of the pieces to have a good vision or to prepare a good plan?”

Few will have the greatness to bend history itself; but each of us can work to change a small portion of events, and in the total of all those acts will be written the history of this generation.

Robert F. Kennedy

Having a good vision as a first step for social change. TBUSA recognizes this is also true for planning and starting a TimeBank. Drawing upon its own experience and the successes of TimeBanks across the US and worldwide, TBUSA has developed the “TimeBank Un-Puzzle” as a useful approach for visioning and planning.

The “TimeBank Un-Puzzle” portrays nine critical elements that can be used to shape your vision and prepare plans for your TimeBank. It addresses basic questions for successful planning …

- Why do something like a TimeBank …?
- Who can be involved in a TimeBank…?
- What could be done with and by a TimeBank …?
- How could a TimeBank work …?

The “Un-Puzzle” can be used for visioning and planning, and will also be a useful framework for management and evaluation as the TimeBank grows.
4.2 The “TimeBank Un-Puzzle” for Strategic Visioning

The purpose of the “TimeBank Un-Puzzle” is

to highlight critical elements for strategic visioning and planning,
to help un-puzzle and demystify what needs to be considered, and
to begin learning about basic requirements for starting a TimeBank …

… including, the importance of being a
“learning” organization:

Note: The intent of strategic visioning is not on gathering data for a complete or comprehensive TimeBank model. Rather, the intent is to share readily available information and gain sufficient agreement on intent and possibilities so that there is a good framework and foundation for the next stages of planning and starting your TimeBank.
Using the “Un-Puzzle” Elements

Realistic visioning is a first step for shaping your ideas for a TimeBank into sensible possibilities that can, in turn, can create new realities.

_The Strategic Visioning Profile should address all elements of the TimeBank Un-Puzzle._

Whatever level of visioning you decide to undertake, it is very important to address every element in the “TimeBank Un-Puzzle”.

An incomplete vision leaves gaps which can weaken the vision and undermine the design, operations and success of your TimeBank.

_Strategic vision emerges and takes shape as elements are addressed._

Preparation of a Strategic Visioning Profile begins with a sense of anticipation about a vision, but there is no complete strategic vision until vision and ideas for each element are discussed and agreed.

The visioning process allows the vision to emerge and take shape. Your team will benefit by pursuing looped processes of visioning and discussion.

Team discussions of the visioning elements and preparation of documentation must be an open, creative process. In this way, the product of the discussions, a Strategic Visioning Profile, has an integrity that has adequately challenged and tested as a good starting point for your TimeBank.

_Strategic visioning precedes planning._

Strategic visioning involves foresight, hopes, imagination and possibilities. Vision is not to be detailed or specific; rather it is to be creative, innovative and inspiring.

Strategic visioning will emphasize importance of the “who” and “why” for creating a TimeBank.
Nonetheless, visioning will give attention to “what”, i.e., strategy and design.

And it will also look at the elements related to “how”.

A commitment will also be made to evaluation and striving to make your TimeBank a learning organization.

*It is important to give as complete a picture as possible of the vision for the TimeBank because it forms the framework for planning.*

Planning and Start-up, which is discussed in TBUSA’s Guidebook 3, will emphasize further and deeper definition of the “who” and “why” elements, but will also give greater attention and prepare more detail with regard to the “what” and “how” elements of the TimeBank Un-Puzzle.

Planning and Start-up will involve information gathering, analysis, decision-making and documentation to further clarify and adapt as necessary the ideas in the vision and to look for practical ways and means to move the vision and its implementation forward.

Your team will revisit and refine initial visioning statements on specific issues and elements as additional information is found and developed in the next planning stage for your TimeBank.
4.3 Putting The “TimeBank Un-puzzle” Together

The "TimeBank Un-Puzzle"

Created by Merlyn Kettering for TBUSA © 2009
Priority Elements for Strategic Visioning

The “TimeBank Un-Puzzle” is formed by nine basic “elements” that are usually expected to be included and addressed in every vision, plan and proposal. The nine basic elements address fundamental planning questions of who, why, what and how for your TimeBank.

Any of the elements, or combination of elements, may be a starting point for a vision; yet any one or two or more of the elements will be insufficient, alone, to form an adequate vision for your TimeBank.

Highest Priority Elements for Visioning

For visioning, the team must give their most attention to the critical aspects of the elements dealing with “who”, and “why” dimensions of the vision. (people, purpose, situation)

From these elements come the convincing ideas that will draw interest in a TimeBank.

The team must also give adequate attention to “to important aspects of the “what dimensions of the vision. (strategy, design).

Lesser attention will be given to the ‘green’ and ‘yellow’ elements for visioning. Ideas for these elements will be looked at with specificity and detail in the next stage – Planning and Start-up.
Finally, a statement of commitment to evaluation and becoming a learning organization is especially important. TimeBanking requires innovation and change, so evaluation supports the learning and adaptation needed to for success and to give assurance to potential partners and sponsors.

Each piece of the “TimeBank Un-Puzzle”, i.e., the “planning elements” needs to be discussed and addressed to some extent to have a complete vision for your TimeBank.

In Chapter 5, each planning element of the “TimeBank Un-Puzzle” is discussed along with ideas related to visioning that can help guide the development of a vision that is suited to a TimeBank for your community.

Key factors for each element, as well as supporting information and important considerations, are noted for the discussions and deliberations of the visioning team, as illustrated below.

The information generated during the visioning exercises will be used to prepare a Strategic Visioning Profile and related documentation such as mission statement, brochure, proposals, etc. It will be carried forward into the start-up planning for your TimeBank.

Consider using a “checklist” as a tool for information assessment and planning, as shown on next page. This tool can be modified for tracking progress and other uses during your visioning and planning assignments.
### Strategic Visioning and Planning Checklist – Information Survey

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**Notes:**
4.4 Planning for Strategic Visioning Sessions – Action Steps

Use this opportunity for your team to decide on the process, pace and number of sessions you anticipate will be needed for visioning the elements of the model.
As you plan sufficient time to address each element of the Profile, include time for review and revision as visioning proceeds.

4.4(a) Purposes and Agenda Possibilities

**Purposes**
- To prepare a Vision Document for your TimeBank
- To share and discuss ideas and information for the vision overall and each element of the vision
- To agree on the final version of the vision for the TimeBank

**Suggested Agenda for Strategic Visioning Meetings**

- **Opening the Session (10-15 minutes)**
  - Welcome & Review
  - Purpose / Focus (specific plan elements)
  - Norms (how are we doing?)

- **The “TimeBank Un-Puzzle”**
  - The “Un-Puzzle” and Elements
  - Priorities for Visioning
  - Using the Un-Puzzle Elements

- **Planning Activity (e.g., 100 - 180 minutes)**
  - Planning the selected elements for this meeting
  - Information-sharing
  - Brainstorming
  - Planning

- **Summarizing and Looking Forward (20-40 minutes)**
  - Summarizing achievements of the meeting
  - Planning next steps and next meeting
  - Review of assignments
4.4(b)  Ideas for Strategic Visioning Meetings

---

Opening the Meeting(s)

Welcome

- Welcoming statement. *After welcoming members, take time to review what has been achieved and key points the team needs to keep in mind.*

  Invite comments about where the team is and any points to remember.

- Warm-up Exercise: *Select a quotation, such as the one above, for a warm-up exercise. Ask for comments and discussion that relate the quotation to TimeBanking and the planning for your TimeBank.*

- Purpose Statement (a suggestion)

  *We are meeting to plan for elements (specific elements) and to review any additional ideas you may have for elements and plans we have covered previously (give examples). Our schedule for the day is ....*

Review of Teamwork

Review teamwork and progress on the assignment and ask for comments.

*Are we working well together? Is there anything we should consider or keep in mind? Are we making progress? Is there anything we should consider or keep in mind? Are there any ideas about how we could more effective in our planning and meetings?*
Heart of the Session – Strategic Visioning

The “TimeBank Un-Puzzle” – (p. 54)

Distribute Handout of the “TimeBank Un-Puzzle”. Discuss the handout. Emphasize (a) how the learning cycle is reflected by the visioning elements, (b) how the logic of design follows the factors and the elements, and (c) how learning is central to visioning and planning.

Priorities for Strategic Visioning - (pp. 55-56)

Use the Study Materials. Discuss the visioning elements and the information elements required for visioning and planning. Observe how the model represents the comprehensive information needed for realistic visioning and for start-up planning.

Consider the priorities suggested by the study materials. Note that the model identifies illustrative key questions for visioning and information relevant for visioning. Each team will determine what is required for their situation and how much will be required at this visioning stage. With an understanding of this model, the team is ready to enter into the visioning meetings.

Setting a schedule for strategic visioning sessions

Prepare a tentative schedule of visioning meetings and the agenda for the meetings, i.e., which profile elements to discuss at each meeting.

For each element, discuss your expected level of detail for the plan. Discuss what information can be obtained or prepared before meeting. Agree on your meeting schedules and agendas.
4.4(c) Steps for strategic visioning sessions by element

Strategic visioning is a critical initial for successfully creating a TimeBank. We suggest that the team consider adopting a systematic sequence of steps for the visioning session for each of the visioning elements. This helps the team organize and conduct productive discussion session and to produce required statements for the Vision Profile.

The following is an illustrative sequence that may be a useful guide for your team as it decides on its own process. It will help for members to know where they are and where they are going in the discussions.

Step 1: “Brainstorming” – bringing out as many relevant ideas as possible.
Step 2: “Clarifying” – getting clarity and understanding about the ideas.
Step 3: “Criteria” – key questions to use for focusing on points to be selected.
Step 4: “Selection and Priority” – choosing the most relevant ideas for focus.
Step 5: “Elaboration” – further defining and refining the selected ideas.
Step 6: “Summarizing” – condensing learning, essence and understanding.
Step 7: “Assignment” – assigning writing draft of conclusions/decisions
Step 8: “Team Review” – reading and discussion of draft documentation
Step 9: “Agreement” – agreement on final documents for the element

Element Visioning Sessions: Repeat your chosen sequence of planning steps for each element. Illustrative materials for the planning discussion for each of the elements in the study materials and handouts may be created for the sessions.

Review and Revision: Take time to see if there is need to consider review and revision of any previous work as the planning proceeds.

Note: Quotations: As a transition between discussions of each element, arrange to look at and share views “quotations” as this can spice-up and give flavor to your group discussions and interactions.

Note: TimeBank Stories: Inserting discussions of TimeBank stories into your meetings may be helpful as you think about your own TimeBank. Familiarity with TimeBanking experiences can give grounding to your own planning.
4.4(d) Suggestions for Managing the Visioning Sessions

- Use the Visioning Elements as the model for organizing the team discussions

- Conduct distinct discussions for each visioning element, noting that several elements may be discussed during a single session or meeting

- Organize the discussions in a sequence of your preference

- Encourage team members to be familiar with the study materials for each visioning element

- Use the Study Materials of Chapter 6 for preparing for and guiding your discussions including:
  - Discussion text
  - Quotations
  - Exercises

- Develop and adapt additional materials that will be relevant to your situation and for your team

- Rotate responsibility for facilitation of discussions as seems appropriate for members in your group.

- Establish and maintain a file for documentation related to visioning

- Assign responsibilities for documentation of discussions of the planning elements (See modified “checklist tool” on next page that can be used for assignment tracking.)
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Notes:
Chapter 5:
Preparing a Strategic Vision for Your TimeBank

5.1 Strategic Visioning Element – People

Who will do something? Who will be involved?
Envision who will be involved with your TimeBank, including who can help get it started, who will be recruited to join, and who are the people to be engaged in the programs and activities of the TimeBank.

Who wants a TimeBank? Who will be involved? Who will do something to make it work?
(Envision Leaders, Membership and Associates of your TimeBank)

✔ Who to Invite and Involve
☐ Leadership and Support
☐ Expectations about Membership
DISCUSSION: People and your TimeBank

People are the heart and soul of your TimeBank. A TimeBank exists for people. It is what a TimeBank is. People form a TimeBank. People make a TimeBank work.

The people element is one of the most important for a Strategic Visioning Profile – who wants a TimeBank and who will be involved,

A clear statement of vision about people is the fundamental starting point for designing and shaping your TimeBank.

A Team Trigger Activity

Ask members to think of an actual or a composite person of your community who is likely to benefit by joining a TimeBank. Visualize the person’s face … walk … character … daily rituals sense of life … any special characteristics.

Then, think of another.  And then, another.

Go around the group, asking members team to share, one at a time, descriptions of the persons they have visualized.

After the descriptions, ask if the persons described reflect the whole community? What of the balance? Any who were left out?

Ideas about Membership

By laying out your vision for people, you are defining one of the most critical elements of the vision for your TimeBank. People determine the purpose and the scope of the TimeBank, including types and ranges of services and the operations of your TimeBank.

It will be helpful to consider:

✓ Location and geographic range to be covered
✓ People to be involved in the TimeBank
Interests and motivations of potential members
Expected levels of recruitment and involvement

Ideas about Leadership

Think about the types of persons who need to be involved in planning for a TimeBank. In getting a TimeBank started. In leading and managing a TimeBank.

Share your ideas about the types of persons need for leadership.

Think about what you were looking for in leadership. Share your views and insights about leadership requirements.

Ideas about Scope of Services

Your Strategic Visioning Profile begins to define the range of services and functions for your TimeBank, as illustrated by a Skills List in Attachment 1.

Take time to consider the range and balance of services or functions you think likely for the composite persons described in the trigger exercise.

Ideas about Special Groups and Interests

Consider if there are special groups or special interests that can be drawn to or need to be accounted for as you define TimeBank scope and services.

Ideas for your Strategic Visioning Profile

Check out any initial ideas you have and how these are relevant for your Strategic Visioning Profile. For example:

a) People or groups of people likely to be quickly recruited to a TimeBank

_________________________________________________________________________________
_________________________________________________________________________________
_________________________________________________________________________________

b) Organizations likely to have interest in associating with a TimeBank

_________________________________________________________________________________
_________________________________________________________________________________
c) Expected membership (from launch to six months)

- ___ small: 10-15 recruits / members
- ___ medium: 16-40 recruits / members
- ___ large: 40-150 recruits / members
- ___ very large: 150-200 recruits / members
- ___ grand: greater than 200 recruits / members

d) Expected membership at one year

- ___ small: 20-40 members
- ___ medium: 40-80 members
- ___ large: 80-250 members
- ___ very large: 250-400 members
- ___ grand: greater than 400 members

e) Factors likely to affect interest and involvement in a TimeBank

---

☑️ Strategic Visioning Assignment – People

☑️ Discuss and agree on critical ideas about who will be involved, including leadership and membership. Consider how to build these ideas into your Strategic Visioning Profile.

☑️ Think about who can be reached out to for support and who may be called upon to plan important roles in planning and getting started. Consider how these ideas affect vision and planning.

☑️ Draft a Visioning Statement about People for your TimeBank, including summary statements about leadership, potential members and other factors identified in your discussion. The statement should give a clear understanding of who will be
involved in the TimeBank, how they will be involved and assumptions about involvement.

✓ Identify any supporting statements and documentation that the core team deems might be relevant for planning purposes.
5.2 Strategic Visioning Element – Purpose

*Why do something?*

Envision the intended nature of your TimeBank and its major purpose(s), and link purposes to intended outcomes and benefits, including desired impacts, changes and future directions.

---

**Why do something? Why create a TimeBank?**

(Envision Purposes, Objectives and Outcomes for Your TimeBank)

- Mission Statement
  - Purposes and Goals
  - Desired Benefits and Outcomes
DISCUSSION: Purpose of your TimeBank

Purpose is one of the three most important elements of your Strategic Visioning Profile. A clear statement of purpose for your vision is a fundamental starting point for designing and shaping your TimeBank.

A Team Trigger Activity

Ask each member to imagine that your TimeBank has been operating for two years. Think of a specific time of the year, (e.g., early July, late October) and talk about what you hope will be happening within the TimeBank during one week.

Share your imaginations. Discuss and interpret the imaginations.

Then, translate what the imaginations that have been described into the purposes of the TimeBank at that future point.

Discuss and assess these purposes and their relevance for the statement of purpose that you will write for the TimeBank.

Types of TimeBanks

TimeBanks differ. TimeBanking can be used for different purposes. Different TimeBanks are suited to different purposes and conditions.

The type of TimeBank you seek is based on the characteristics of your community and the purposes you are pursuing.

Let’s look at two of the most common generic types: Neighborhood TimeBank and Specialized TimeBank.

Neighborhood TimeBank

There is a saying that it takes a village to raise a child – but what does it take to raise a village?

Edgar Cahn
A neighbor-to-neighbor TimeBanks aim to build and strengthen supporting relationships and networks within a neighborhood or community.

Members are encouraged to help each other and act like an extended family, that is, to ‘be a village’ in which people care and support each other. (See Attachment 1, Skills Checklist, which illustrates types of support and services people can exchange.)

In neighborhoods where there is a low sense of community, a TimeBank helps rebuild trust and relationships to revive and reweave community. (See Attachment 2: Circle of Giving which represents how people can form a network to give support to each other.)

Neighborhood TimeBanks are usually initiated by interested individuals seeking to rebuild their communities. They will benefit by getting support or partnering with community groups, religious groups, neighborhood associations and similar groups.

A neighborhood TimeBank may also be started by social services or social welfare organizations and agencies who view the building of social support networks as a key to their success.

**Specialized TimeBank**

We can do more together than anyone of us can do alone.

*Anonymous*

A specialized TimeBank, associated with service organizations or special service groups, aims to create a greater sense of ‘we’re in this together’ with a focus on groups that share common interests. (See Attachment 3: A Co-Production Network which illustrates organizations forming networks and having co-production relationships with clients and each other.)

Some groups have been formed by social service organizations to secure more genuine relationships and partnership with their clients. The aims are often to engage clients as partners in services and to build capacity and self-respect, to overcome downward cycles of dependency, and strengthen services impacts.

Some groups have formed as people with common needs and problems come together to support and learn from each other. Some may form around specific challenges or issues. Others have formed to address specific community issues.
Specialized TimeBanks often focus on services and projects that meet the special needs of their members and that build networks and partnerships between members and, were relevant with sponsoring agencies, where relevant.

**Purpose and Outcomes**

People will join TimeBanks for different reasons. TimeBanks serve to achieve multiple purposes or objectives – providing services, building community, reducing social tensions, etc. It is important to have as clear a sense as possible of the objectives you desire for your TimeBank.

Your statement of purpose highlights services and achievements that will be expected of your TimeBank. A good statement of purpose communicates what the TimeBank is and will be used to attract people to it.

**Ideas for your Strategic Visioning Profile**

Check out any initial assumptions you have and how these are relevant to the purpose you have for your vision of a TimeBank. For example:

- **a) Type of TimeBank**
  
  _ __ neighborhood TimeBank
  _ __ special interest TimeBank
  _ __ neighborhood and special interest TimeBank
  _ __ focus and advocacy group TimeBank
  _ __ other ...

- **b) Purposes of TimeBank**
  
  _ __ neighbors helping neighbors
  _ __ special services for vulnerable people
  _ __ strengthening community and associated organizations
  _ __ advocacy for special groups and interests
  _ __ other ...

- **c) Ideas for specific statements of purposes for your TimeBank**
  
  __________________________________________________
  __________________________________________________
  __________________________________________________
d) Ideas about goals, objectives and outcomes expected for your TimeBank

_____________________________________________

_____________________________________________

_____________________________________________

_____________________________________________

e) Ideas about other assumptions or characteristics affecting purpose

_____________________________________________

_____________________________________________

_____________________________________________

Strategic Visioning Assignment –Purpose Statement

- Discuss and agree on critical assumptions regarding purposes of the TimeBank.

- Agree on the major purpose(s) of the TimeBank. Agree on supporting purposes and objectives. Consider how these are related and can be linked.

- Write a first drafts **Purpose(s)** including objectives and outcomes expected for your TimeBank.

- Begin to a draft **Mission Statement** for your TimeBank. Summarize the key points of purpose and objectives into a concise format. This will help as you proceed with visioning for the other planning elements. One of the final visioning activities
will be to write an official Mission Statement, as discussed in Chapter 6 below.

✓ Identify and begin to collect documentation and materials that are deemed useful and relevant for the next phase of planning.
5.3 Strategic Visioning Element – Situation

*What’s happening around here?*

Identify characteristics of the situation that are relevant to starting a TimeBank and envision opportunities and challenges to which your TimeBank will respond and that will influence its success.

---

**What’s Happening Around Here?**

**What is relevant to creating a TimeBank?**

(Envision Situational Characteristics, Opportunities and Needs)

☑ **Introductory Situation Statement**

☐ Background and Context

☐ Opportunities, Assets and Challenges
DISCUSSION: Situation and Context

Situation and Context

Situation and relevance is an important element of the Strategic Visioning Profile. It gives an understanding of why a TimeBank is needed. The vision will need statements about the context to portray why and how a TimeBank is relevant for your community. The statement need not be comprehensive or long. It must make sense.

A Team Trigger Activity

Ask members to think about the situation of the community and the context for the TimeBank. Give each member a lined paper and ask them to make a column, on the left hand side, and list any unused, unseen or underutilized assets that could be mobilized.

Then in a column to the right of each asset, indicate how that asset could be used and what would be gained.

Go around the group, asking members team to share, one at a time, assets from their list. Allow for questions and reflections.

Then ask if any other assets have come to mind during the discussion.

Finally, read aloud the ways the assets could be used, one at a time, around the circle, the ways assets could be used and what would be gained.

Allow time for the team to reflect on what this could mean for the persons in the community and for the community as a whole.

Situation and Context

An understanding of context forms the underlying rationale to support the vision and the goals, objectives and outcomes for your TimeBank.

Opportunities / Strengths: TimeBanking begins with an “asset” attitude. The basic aim of a neighborhood TimeBank is to match unused resources with unmet needs. Include in your vision a
statement about opportunities and conditions that allow for matching assets with needs – the “windows of opportunity” for a TimeBank.

**Needs / Challenges:** TimeBanking seeks to address problems and overcome challenges for the benefit of people and communities. Include in your vision a statement about problems and challenges and a projection of what happens if addressed and if not resolved.

**Balance:** Your visioning will benefit if your statement reflects the problems in the opportunities as well as the opportunities in the problems. Seek to be realistic with your vision.

It is not necessary to gather mass amounts of information. Rather, the goal is to assess the situation to see how your vision for a TimeBank fits into your community and if it can address felt needs and real opportunities.

**Ideas for Your Strategic Visioning Profile**

Check out any ideas you have and how these are relevant for your Strategic Visioning Profile. For example:

a) **Reasons for creating a TimeBank**

   _ ___ responses to special interests or groups
   _ ___ opportunities to better use resources
   _ ___ needs to solve problems for people
   _ ___ significant community problems or trends to reverse
   _ ___ significant community resources to mobilize
   _ ___ other ...

b) **Reasons arising from the context for starting a TimeBank**

   ______________________________________________________
   ______________________________________________________
   ______________________________________________________
   ______________________________________________________
   ______________________________________________________

   c) **Opportunities associated with the objectives of the TimeBank**

   ______________________________________________________
   ______________________________________________________
d) Strengths and assets that can be drawn upon or mobilized

f) Other elements or characteristics of context of relevance

☑ Strategic Visioning Assignment – Situation Statement

☑ Discuss and agree on critical ideas regarding context and the relevant characteristics and factors relevant for the Strategic Visioning Profile.

☑ Discuss the opportunities that the TimeBank may leverage and assets or strengths that can be advantages for this initiative.

☑ Discuss the problems that the TimeBank may address or fact and weaknesses that need to be taken into account.

☑ Draft a Visioning Statement on Context and Background for your TimeBank, including summary statements about opportunities / strengths and problems / weaknesses identified in your discussion. The Context Statement should give a concise yet effective understanding of context factors influencing design.
of the TimeBank. It should not be long or extensive, but must portray a compelling picture to justify the vision for a TimeBank.

✓ Identify and begin to collect documentation and materials that are deemed useful and relevant for the next phase of planning.
5.4 Strategic Visioning Element – Strategies

How will TimeBanking be done?

Envision the TimeBanking strategies, methods and approaches that will be used in your TimeBank to carry out its services and do its work in your community and/or organization.

How will TimeBanking be done in our community?
(Envision Strategies, Methods and Approaches for your TimeBank)

☑️  TimeBanking Strategies and Methods

☐  Services and Exchanges

☐  Possibilities for Community

☐  Possibilities Co-Production
DISCUSSION: Strategies, Methods and Tools

Leaders establish the vision for the future and set the strategy for getting there; they cause change. They motivate and inspire others to go in the right direction and they, along with everyone else, sacrifice to get there.

John Kotter

Strategy is a most critical element of your Strategic Visioning Profile. You will be introducing innovations and changes that leaders, members and the community will need to adopt and own for TimeBanking to succeed.

For this element, you will envision how TimeBanking methods can be used in your community and what approaches can be pursued to be applicable, effective and sustainable. This need not be a long statement, but it should indicate how TimeBanking will be adapted and used in your TimeBank.

A Team Trigger Activity

As leaders, we must be the change we want to see. Think of how you will be engaged in the TimeBank two years from now. Now, think of any changes you, yourself, will have to make, adopt and personalize to be a good TimeBanker and to be in the role you imagine for yourself.

Ask members to ask themselves three questions:
(1) Am I willing and committed to make the change(s)?
(2) Do I understand why I want to make these changes?
(3) What will I need to make these changes?
(4) Who will I need to help me make these changes?

Ask members to share their personal responses and reflections with the group. Encourage active listening.

What can members and the team as a whole learn about change strategies from their responses and reflections?

Overview of TimeBanking Strategies, Methods and Tools

TimeBanking. The basic method of TimeBanking is simple. A TimeBank member earns and spends Time Dollars by giving and receiving services and being involved in group activities. This method of exchanging skills helps individuals and has powerful ripple effects in building relationships and strengthening community.
Types of TimeBanking Transactions. *Earning* a Time Dollar involves a person doing something for someone else. *Spending* a Time Dollar involves a person being helped by someone else. Each transaction involves a change of a Time Dollar in the accounts of the persons involved.

**One-to-One Transactions:** For most people, TimeBanking is easily understood as transactions between members, one member helping another member and the transaction being recorded as Time Dollars. The transaction is simple: one hour of help is recorded as one Time Dollar into one account and one Time Dollar out of the other account. That is the nature of one-to-one transactions, which is the most common and dominant form of TimeBanking.

**One-to-Many Transactions:** Some TimeBanking transactions take the form of “one-to-many”. To illustrate, if a member offers dancing lessons and several members take the lessons at the same time, this is a one-to-many transaction. The dance teacher earns one Time Dollar from each participant for very hour of instruction. One member is helping many members (“one-to-many”).

**Many-to-One Transactions:** Some TimeBanking transactions take the form of “many-to-one”. To illustrate, if a member needs a home project, such as home cleaning or painting, and several members team up to provide the help, each of the helpers earns Time Dollars from the member receiving the help. Many members are helping one member (“many-to-one”).

**Many-to-Many Transactions:** Some TimeBanking transactions take the form of “many-to-many”. This can be illustrated by a community event that is sponsored by a TimeBank, e.g., a play, musical or potluck. All members who contribute to the event earn Time Dollars for their contribution, while all members who attend spend Time Dollars for coming to the event. Many members helping many members (“many-to-many”).

**TimeBank Scope and Services.** Based on your mission statement, you can begin to define the range of services and functions that you foresee for your TimeBank. Reconsider the range and balance of services or functions you hope to create for your TimeBank. If you get involved with any special services or interests groups, consider how this can leverage support for your TimeBank, for members and for the community.
**Co-Production.** Co-Production is the use of TimeBanking to form partnerships between professionals, clients, and community, working together for more effective social services and stronger communities. Services are more successful when the people being served are actively involved in the processes from the beginning. Teaching is an example. A teacher may teach well, but learning happens when students become engaged and when families are supportive and proactive. Co-Production is applicable to nearly every field of service. Engaging participation gets better results because clients and their work are valued and rewarded – reciprocity of mutually rewarding and effective relationships.

**Keeping TimeBank Accounts: Community Weaver.** Community Weaver is the TimeBanks USA software used for TimeBank operations. Accounts can also be kept manually, but this works well only with relative smaller groups. Each TimeBank has a website for members, skills and services so that TimeBank exchanges can be arranged by online, by phone or through a coordinator. The Community Weaver software is used to facilitate member exchanges and keep TimeBank accounts of members.

**Community Events.** Building community is a main focus for many TimeBanks. TimeBanking can be (i) location-specific (exchanges between people in neighborhoods) or (ii) interest-specific (persons with common interests, e.g., youth, family wrap-around, etc.) or some combination of these. Whatever the type, the formation and strengthening of community is critical. Community events as well as exchanges are important to the operations of TimeBanks.

**Organizational Change.** TimeBanking and Co-Production call for judicious use of organizational change strategies, especially if introducing service and program innovations. Beginning with visioning, it is important to consider change strategies that will work in your community and for your organization.

**Social Change.** A TimeBank is more than a place; it is more than the availability of services or support; it also promotes empowerment and social change. A TimeBank builds relationships, creates trust, strengthens community, and advocates social change for justice, equity and well-being.
Ideas for Your Strategic Visioning Profile

Check out any ideas you have and how these are relevant for your Strategic Visioning Profile. For example:

a) Expected uses of TimeBanking and Co-Production

- ___ personal services within neighborhood
- ___ personal and professional services in a community
- ___ expanding services to special needs and interests
- ___ extending services for building community
- ___ Co-Production services and clients
- ___ Co-Production as program innovation
- ___ other ...


b) Expected scope of TimeBanking applications

- ___ TimeBanking within a neighborhood
- ___ TimeBanking within and across neighborhoods
- ___ TimeBanking for special population / needs
- ___ TimeBanking and Co-Production combined
- ___ Co-Production in services or programs
- ___ other ...


c) Likely dominant types of services and exchanges for TimeBanking in your community and organization

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
d) Likely possibilities for Co-Production applications in your organization and community

_____________________________________________
_____________________________________________
_____________________________________________
_____________________________________________
_____________________________________________
_____________________________________________


e) Ideas about likely changes and implications arising from introducing TimeBanking and/or Co-Production in your community or organization.

_____________________________________________
_____________________________________________
_____________________________________________
_____________________________________________
_____________________________________________
_____________________________________________


f) Ideas about change strategies required for successfully introducing TimeBanking or Co-Production in your community or organization

_____________________________________________
_____________________________________________
_____________________________________________
_____________________________________________
_____________________________________________
g) Ideas for the team to prepare for introducing change strategies

Strategic Visioning Assignment – Strategies

Your core team will need to consider how the basic strategies and methods of TimeBanking will be adapted and used suitably in your community.

- Discuss and agree on ideas and critical assumptions regarding the strategies for TimeBanking methods and approaches and how they will be adapted to fit your context and services. Consider implications these have for your Strategic Visioning Profile.

- Discuss ideas about sustainability and growth for your TimeBank and consider the implications arising from these for your Strategic Visioning Profile.

- Draft a Visioning Statement of TimeBanking Methods for your TimeBank, including summary statements about core methods and approaches, including Community Weaver, to be adopted and any implications of these for the design and operations of the TimeBank.

- Identify and begin to collect documentation and materials that are deemed useful and relevant for the next phase of planning.
5.5 Strategic Visioning Element – Design

How to get organized and set up?
Envision the organization that your TimeBank will be, including its design, structure, and relationships in the community and with other organizations.

How to set up your TimeBank?
(Envision Design, Structure and Relationships of your TimeBank)

- Organizational Design
  - Ideas about Location, Structures, Status
  - Ideas about Relationships & Linkages
DISCUSSION: Organizational Design

Design of your TimeBank is essential for being an effective organization. It is key to effective operations. The organization must be set up before any recruitment for members begins. The set-up can be provision and given time to mature – but the design must be clearly in mind for start-up.

Visualize this thing you want. See it, feel it, believe in it. Make your mental blueprint and begin.

Robert Collier

A Team Trigger Activity

Imagine yourself, two years from now, as a stranger from a different state making a one-day visit for the first time to your TimeBank. What would you like to be shown? What would you like to see?

Share personal responses and reflections with the team.
Discuss implications of the responses and their implications for the vision about organizational design for your TimeBank.

Organizational Design

Organizational decisions are very important for a new TimeBank, and often have long-term consequences. The core team will need to set a vision for the organization so that criteria can be established and options can be assessed as the planning moves forward.

Alternatives may include, for example,
- a new organization on its own,
- part of a new organization with broader purposes,
- new organization associated with a new organization,
- organization associated with an existing organization,
- initiative within an existing organization,
- a volunteer effort
- an initiative within an existing program.

Communities and interested sponsors often express interest in new and innovative projects, but are also impressed by known entities and proven approaches. Even if sponsored and funded as a new entity, it is often difficult to get second and third grants without impressively significant achievements or association with reputable services or organizations.
Whether a new organization or linked with an existing agency or service, the TimeBank must creatively pursue linkages and partnerships that enlarge and leverage the effort and help achieve its objectives. TimeBanking can be used as a social technology to engage people, partner with agencies, reward involvement and reweave community.

In addition, it will be helpful to identify any ideas or assumptions you have about:

✓ Legal status, needs for certification, candidacy for 501.c.3 status which requires special attention to the statement of purpose and scope of activities, which is discussed in Guidebook 3.

✓ Management ideas can be included in a general way in the vision. Will it be member-led? To what extent will management be done by volunteers? Will there be salaried officials? What roles or functions will be designated? Are there special structural considerations arising from the scope and services or from the methods and approaches?

✓ Governance design is another important consideration. What are current ideas about governance and accountability? Will a Board be created? Is there an oversight agency? How will governance functions be carried out?

**Ideas for Your Strategic Visioning Profile**

Clarify any ideas and assumptions you have and how these are relevant for your Strategic Visioning Profile. For example:

*a) Organization Setting*

- __ autonomous and stand alone initiative
- __ new program associated with existing agency
- __ integrate into existing program of existing agency
- __ other ...

*b) Organizational Type*

- __ autonomous and stand alone initiative
  - __ new program associated with existing agency
  - __ integrate into existing program of existing agency
  - __ other ...

*c) Organizational Association*

- __ mostly stand-alone
- __ seeking organizational members
- __ actively seeking formal organizational linkages
- __ actively seeking organizational partnerships
d) Ideas about Governance

- __ integrate into existing organization, no board
- __ volunteer board of active members
- __ board of volunteer members and interested persons
- __ board of members and professionals
- __ other ...

e) Ideas about Management

- __ one new staff and volunteer members
- __ several new staff and volunteer members
- __ integrate into functions of existing staff
- __ all volunteer, member-managed
- __ other ...

e) Other organizational characteristics or relations likely to affect design

_____________________________________________
_____________________________________________
_____________________________________________

☑ Strategic Visioning Assignment – Organization Design

☑ Discuss and agree on ideas and critical assumptions regarding organization and organizational design.

☑ Agree on the major organization design, management, legal and governance features and characteristics envisioned for your TimeBank. Agree on a statement of these and consider the implications for other elements of the vision.

☑ Draft a Visioning Statement on Organization Design for your TimeBank, including summary statements about characteristics and features noted above. The Design Statement should be a concise but clear view of what the TimeBank is likely to look like and how it will be organized.

☑ Identify and begin to collect documentation and materials that are deemed useful and relevant for the next phase of planning.
5.6 Strategic Visioning Element – Human and Physical Resources

What’s needed to do it?

Envision the human and physical resources that will be needed for your TimeBank, including for start-up and for on-going routine operations.

What’s needed to do it?
(Envision approximate levels of Human and Physical Resources that may be needed for your TimeBank)

- Human & Physical Resources
- Likely Roles & Personnel
- Office & Equipment Possibilities
DISCUSSION: Human and Physical Resources

Resources make it possible for a TimeBank to actually work. Both human and physical resources must be in place for a TimeBank to start and become operational.

There is room for creative thinking about human and physical resources. Although this is not the time for detail, it is time for innovation. The vision for this element gives images about how the TimeBank will actually work. It is not necessary to establish plans at this level, but it is important to clarify assumptions to give a reasonable idea of what will be required to put the TimeBank into operations. What leadership? Roles for staff? Roles for volunteers? Office requirements? Equipment? Logistics? Transport?

A Team Trigger Activity

Go back in your mind to remember the first-time visit you made to the TimeBank about two years after it was launched. Describe the office and operations you see on that visit.

Share personal responses and reflections with the team.

Discuss implications of the responses and their implications for the vision element of human and physical resources.

Base of Operations

Clarify your ideas about a base for the TimeBank. This will be a key factor in its identity as well as its operations. It could be a home office, an office in an associated organization, a store-front type office. Wherever the choice, it must be seen as both a ‘home’ for the TimeBank and a place where members feel at home as well. A Strategic Visioning Profile can give a sense of where you intend to locate to begin and/or desired characteristics for a beginning location.
Office and Equipment

Clarify ideas about how the office will be equipped, such as office furniture, computers, accessories, software, etc. Indicate if it is to be a gathering place that will need space and furniture for daily and special functions as required by the Tim Bank. Your Strategic Visioning Profile need not be detailed, but should give some sense of what might be required to start your TimeBank. This will looked at in detail during the next planning stage.

TimeBank Roles

TimeBanks require leadership and supporting roles for operations. Types of roles for a TimeBank include: membership recruitment and coordination, administration, events coordination, computer and web functions, team leadership, etc. In the Strategic Visioning Profile, give a sense of how these roles will be filled. For example, for a small TimeBank, a Coordinator can be responsible for overall leadership of the TimeBank, but will need support of others such as volunteers or part-time staff.

For visioning, it is helpful to indicate ideas about the size of the leadership team and balance of using staff and volunteers for doing the major work of operating the TimeBank. Details of roles and responsibilities will be dealt with in detail during the planning stage.

Ideas for Your Strategic Visioning Profile

Check out ideas and critical assumptions you have and how these are relevant for your Strategic Visioning Profile. For example:

a) Ideas for Location

   _ ___ a room in a house
   _ ___ an office in another organization
   _ ___ shared space with another group
   _ ___ a rented office
   _ ___ other ...

b) Ideas for office equipment

   _ ___ purchase (list)
   _ ___ obtain used (list)
   _ ___ donations (list)
   _ ___ other ...

c) Ideas for leadership roles

   _ ___ staff roles (list)
   _ ___ volunteer roles (list)
   _ ___ shared with other organizations (list)
   _ ___ other ...

d) Other assumptions about human and physical resources

Strategic Visioning Assignment – Resources

✔ Discuss and agree on critical ideas and assumptions regarding human and physical resource requirements for your TimeBank.

✔ Agree on the major resource requirements and any significant features, characteristics or qualifications for these. Agree on a statement of these and consider the implications for other elements of the Strategic Visioning Profile.

✔ Draft a Visioning Statement of Resource Requirements for your TimeBank, including summary statements about human and physical resources and any key features. The Resources Statement should be a concise but clear view of the vision about physical and human resources that required for start-up and early operations of the TimeBank.

✔ Identify and begin to collect documentation and materials that are deemed useful and relevant for the next phase of planning.
5.7 Strategic Visioning Element – Finances

What costs? What financing?

Envision an anticipated budget for your TimeBank, including start-up costs, annual operating costs, special events and services, and other expenses.

What costs? What financing?
(Envision approximate Budgets and possible Sources of Financing for your TimeBank)

✔️ Budgets & Financing Possibilities

☐ Expected Level for Start-up and Annual Budget

☐ Sponsors, Supports and Financing Possibilities
DISCUSSION: Finances

Financing is an important factor for starting and sustaining a TimeBank. It is an illusion to imagine that a TimeBank can operate without funding. Although “time” is the measure of exchange for a TimeBank, the TimeBank is not and cannot be totally isolated from influences of our market economy. Certainly, the costs of a TimeBank may be lower than other organizations, but, nonetheless, financing is required to keep a TimeBank in operations.

Therefore, your vision needs to make a statement about likely costs and financing strategies. Your TimeBank plan will need to garner sufficient resources to get started and assure reasonable period of pilot operations.

There will be expenses for initial office set-up, staff, equipment, office space, communications, training, program events, and office and operating expenses. Costs depend, of course, on strategies and plans of other elements, such as scope, design, resources, etc.

There are alternative strategies for financing of a TimeBank. Each will develop its own strategies and budget model, depending on the type of TimeBank, how it is managed and its activities. Among the areas of major differences are: (i) the role of coordinator – which may be volunteer, part-time, or full-time, (ii) the amount of support required for operations, and (iii) sponsored events and projects.
Many TimeBanks start by applying for a small grant for a feasibility study and some pilot activities, with the intent that the feasibility grants can often be used to attract additional finances. Others apply for funding for a given period of operations, often with the intent to use a track record to attract and leverage additional funding. Either way, for the planning purposes of the next phase, it is important to begin collecting sufficient information to justify the level of funding that will be required.

At this point, you will need to (1) consider your ideas about expectations for budget – start-up and annual operations, and (2) think creatively about strategies for obtaining resources and funding. You can think of long-term strategies as well as immediate and short-term funding to get started. Think also of strategies for using community resources and mobilization to help support funding requests and bids.

When you begin planning for your TimeBank (Guidebook 3), you will be preparing detailed budget and cost estimations. In the meantime, it is useful to know approximate budget levels drawn from experiences of various TimeBanks. The following chart shows relative typical budget estimates for (a) a volunteer-led TimeBank and (b) a staff-led TimeBank.

**Illustrative of Approximate TimeBank Budget Estimates**

<table>
<thead>
<tr>
<th></th>
<th>Volunteer-led</th>
<th>Staff-led</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Start-up</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Office furniture and equipment, computer and peripherals, other materials (unless donated)</td>
<td>$5,000</td>
<td>$5,500</td>
</tr>
<tr>
<td><strong>Annual Operations</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Staff (e.g., Coordinator and Administrator)</td>
<td>--</td>
<td>$90,000</td>
</tr>
<tr>
<td>Operations (e.g., communications, travel and logistics, insurance, publicity)</td>
<td>$12,000</td>
<td>$30,000</td>
</tr>
<tr>
<td>Volunteers and community: (e.g., expenses, member benefits, awards, events)</td>
<td>$4,000</td>
<td>$6,000</td>
</tr>
<tr>
<td>Contingency</td>
<td>$3,000</td>
<td>$5,000</td>
</tr>
<tr>
<td><strong>Total Annual Budget</strong></td>
<td>$19,000</td>
<td>$131,000</td>
</tr>
<tr>
<td><strong>Total First Year Estimates</strong></td>
<td>$24,000</td>
<td>$136,000</td>
</tr>
</tbody>
</table>

**Ideas for Your Strategic Visioning Profile**

Clarify the ideas and critical assumptions you have and how these are relevant for your Strategic Visioning Profile. For example:

a) **Budgets**

   _ minimal budget, low start-up costs_
b) Financing

- ___ seeking no financing
- ___ seeking minimal financing ($1500-$2000 or less)
- ___ seeking start-up financing more than $2000
- ___ seeking financing more than $10,000
- ___ seeking financing more than $20,000
- ___ seeking more than $30,000

c) Sources

- ___ grant funding
- ___ organizational sourcing
- ___ fund-raising activities
- ___ projects and/or program funding
- ___ sponsorship strategies
- ___ other

☑ Strategic Visioning Assignment – Finances

☑ Discuss and agree on critical assumptions regarding approximate costs and finance needs.

☑ Agree on the major cost and finance factors envisioned for your TimeBank. Agree on a statement of these and consider the implications for other elements of the vision.

☑ Draft a Visioning Statement of Financing for your TimeBank, including summary statements about budgets and financing strategies. The Statement should be a concise but clear view of the budget and financing levels anticipated.

☑ Identify and begin to collect documentation and materials that are deemed useful and relevant for the next phase of planning.
5.8 Strategic Visioning Element – Timing

When will things happen?

Envision phases and anticipated timing for your TimeBank, including planning for start-up, launch and start-up, benchmarks and key dates.

When will things happen?
(Envision Phases, Timing and Key Benchmarks)

☑ Phases and Timing

☐ Anticipated Phases / Timing

☐ Anticipated Key Benchmarks
DISCUSSION: Timing

Timing is a critical consideration for the success of a TimeBank. Time is needed to ensure adequate attention to planning and preparing. Timing will determine phases and benchmarks for launching and leading a TimeBank into operations.

My interest is in the future; as I’m going to be spending the rest of my life there.
Charles Kettering

A Team Trigger Activity

Go back again in your mind to remember the first-time visit you made to the TimeBank about two years after it was launched. Can you imagine any big events that they would tell you about?

Share personal responses and reflections with the team.

Discuss implications of the responses and their implications for the timing element of the vision.

Timing and Benchmarks

At the visioning stage, it is difficult to foresee timing requirements with much precision. It is however, important to give some sense of the general timing expected for:

- Benchmarks and timeline for start-up planning
- Possible time window (e.g., month) for launch
- Training or development activities for start-up
- Timing / benchmarks for establishing key relationships
- Anticipated fundraising activities and events

Specificity about timing will be possible only as planning proceeds and details are known about what can happen and when. So at this stage, it is necessary only to clearly state assumptions about the above items, and any others that may arise during the discussions.
Ideas for Your Strategic Visioning Profile

Clarify any ideas you have and how these are relevant for your Strategic Visioning Profile. For example:

- Timeline for planning and key events
- Possible target (e.g., month) for launch
- Any training or development activities for start-up
- Expected timing for establishing key relationships
- Anticipated schedules for fundraising, as relevant
- Other benchmarks toward start-up
- Key activities or benchmarks foreseen for start-up phase

☑️ Strategic Visioning Assignment – Timing

☑️ Discuss and agree on critical assumptions regarding timing, phasing or other related factors.

☑️ Agree on the major aspects a vision related to key timing, phasing and schedules that are important for design and planning. Agree on a statement of these and consider the implications for other elements of the vision.

☑️ Identify any key activities, schedules or events that are important to for visioning and planning leading up to start-up.

☑️ Draft a Visioning Statement on Phases and Timing for your TimeBank, including summary statements about phases, timing, activities, schedules or events relevant for vision. The Timing Statement be a concise but clear view of timing and strategies that are critical for the vision of the TimeBank.

☑️ Identify and begin to collect documentation and materials that are deemed useful and relevant for the next phase of planning.
5.9 Strategic Visioning Element – Learning

What do we know? What works? What can be improved?
Envision and make commitment to learning as an important, critical dimension for your TimeBank and for being effective and successful.

What do we know? What do we need to know? What’s working? What can be improved?
(Envision and Make Commitment to Learning and Evaluation)

☑️ Commitment to Learning and Evaluation
☐ Commitment to Performance Monitoring
☐ Commitment to Feedback and Evaluation
DISCUSSION: Learning

Learning is the central piece of the “TimeBank Unpuzzle” because learning opens doorways for innovation, adaptation and success.

*TimeBanks must be learning organizations.* Learning involves intentional use of information, knowledge and experience to influence and re-shape what your TimeBank is and what it does. Learning is critical for personal growth; similarly, it is essential for organizations and for social progress. Learning, linked to visioning, planning and experience, helps TimeBanks get positive results.

Learning involves the gathering and processing of information and knowledge gained from experience, reflection, intuition, and insights. *Evaluation* is a structuring of formal learning patterns for persons, groups and organizations. Evaluation will be an important and critical dimension of your TimeBank.

---

**A Team Trigger Activity**

*Go back in your mind to remember the first-time visit you made to the TimeBank about two years after it was launched. Try to imagine what they will tell you about what worked, what didn’t work so well, and what adaptations they made?*

*Share personal responses and reflections with the team. Discuss implications of the responses and their implications for the vision element of human and physical resources.*

---

**Learning and Evaluation**

A TimeBank must skillfully use knowledge and information from various sources to create and maintain its relevance and performance within its community.
Learning is central to and will affect all elements and dimensions its realm so a TimeBank is able to be resourceful and creative to take advantage of opportunities and to meet challenges. A TimeBank can take advantage of numerous opportunities for evaluation and learning.

**Learning from experience:** A commitment to experiential learning by leadership and members is particularly suitable for a TimeBank. Experiential learning enables persons to reflect on and review actions they have taken and learning points from their experience that will guide future action and improve performance.

**Learning from research:** A TimeBank’s learning can draw upon formal research and evaluation methods which emphasize objective information (facts, figures). Formal evaluation is often a requirement for funding and sponsors. However, formal evaluation is more than a requirement, it is a management necessity! TimeBanks need to have evaluation strategies to build a base of information and a network of understanding and support.

**Learning from stories:** Learning and understanding can be sharpened when formal research is complemented by narrative information (stories, perspectives). Narrative information helps give insights to leaders and is a useful balance to other types of information and knowledge.

**Learning from others:** The TimeBanks Network is a source of learning for a TimeBank. TimeBanking stories from others help sense of difficulties and challenges that will be faced. Seeking stories of people in the same situation is a way good way to learn. A Chinese proverb says "A wise man learns from experience; a wiser man learns from the experience of others."

TimeBanks can learn from and about their own situations and experience, and they can also learn from others to find ideas and guidance for dealing with their own concrete situations. Such learning represents an endlessly mutating reservoir of ideas, guidelines and stories that are traded within the network and have relevance to help influence decision-making and actions.

**Evaluation Strategies**

The reason for a Strategic Visioning Profile about learning and evaluation is to be explicit about the intent to plan to systematically learn – from the context and experience. Evaluation supports and encourages decision-making based on verifiable realities. It helps understand what works and what can be improved, so as to (better) achieve desired goals.

It is not necessary to define how evaluation will be done as part of vision. Commitments to evaluation in the Strategic Visioning Profile are sufficient. This will be considered in detail in the planning stage. For visioning, at least three types of evaluation can be mentioned:
Performance monitoring and evaluation of management, activities and operations focuses on information to give support for tactical judgments and decisions to maintain effectiveness and efficiency.

Formative evaluation focuses on the processes and effectiveness of programs, activities, outputs and productivity as things happen.

Summative evaluation judging the merit and worth of programs and activities and related benchmarks of progress, focusing on outcomes, achievements and benefits.

Ideas for Strategic Visioning Profile

Articulate ideas you have and how these are relevant for your Strategic Visioning Profile. For example:

- Commitment to standards and approaches for reporting and accountability;
- Commitment to standards and approaches for monitoring and formative evaluations of operations and performance;
- Commitment to standards and approaches for formative and summative evaluations of goals and achievements.

Learn to see, and then you’ll know that there is no end to the new worlds of our vision.

Carlos Castaneda

☑️ Strategic Visioning Assignment – Learning & Evaluation

- Discuss and agree on ideas and critical assumptions regarding learning, monitoring and evaluation aspects of your TimeBank.

- Draft a Visioning Statement on Evaluation. Give a statement of commitment to learning and evaluation and ideas about your vision about monitoring and evaluation as important aspects for your TimeBank.
Identify and begin to collect documentation and materials that are deemed useful and relevant for the next phase of planning.
5.10 Ideas to Summarize Strategic Visioning Sessions

Summarizing and Looking Forward (20 – 30 minutes)

Summarizing and Interpreting (15 – 20 minutes)

Suggested Discussion Questions

- How did we do today in visioning for these elements? Any other comments or ideas to keep in mind?
- What things from our discussions are important to emphasize or underline? What things do we need want to remember? Why?
- Things that seem particularly relevant to you? To our community? Why? How?

Decision – Next Session(s)

Suggested Discussion Questions

- What has been meaningful about this session? What are the important things for the team to keep in mind? Are there outstanding questions or issues the team should keep in mind?
- Is the planning process working for us? Is the planning paradigm helpful for our planning? Any outstanding questions or issues for the team to keep in mind?
- Are there things we must do to be ready for the next planning meeting(s)?

- Decision: Set agenda and plans for next planning meeting(s).

Assignments for next Meetings

- Make assignments for next meeting(s) based on agenda, plans and elements to be covered
- Make assignments for preparing, completing or revising documentation and materials, as necessary.
5.11 Records: 📚 Notes of Visioning Meetings: Notes about discussions

Visioning Meeting # _____, date _____________________.
Regarding requirements for the planning elements (Note which elements were discussed and status on each)

Regarding any other ideas and topics.
Notes of Visioning Meeting (continued): Notes and observations about the meeting
Visioning Meeting # _____, date ____________________.

Effectiveness of the meeting

levels of interest and involvement,

demonstration of understanding,

signs of commitment to move forward

any points of significance.

***   ***   ***   ***   ***   ***   ***   ***   ***   ***   ***   ***   ***

Overall evaluation of this meeting: Excellent Satisfactory Needs Improvement Other

Comments:

Assess your group’s interest at this time: None Low Moderate Potential Strong

a) Knowledge: understanding of TimeBanking:
b) Vision: ideas for using TimeBanking
c) Action: willingness to consider TimeBanking
d) Mobilizing: engaging in TimeBanking
SECTION C

A STRATEGIC VISIONING PROFILE FOR YOUR TIMEBANK

- STUDY MATERIAL -

“Strategic Visioning Profile” for Your TimeBank

Chapter 6: Strategic Visioning Profile for your TimeBank
Chapter 6: Strategic Visioning Profile for your TimeBank

6.1 The Strategic Visioning Profile for your TimeBank

Having completed visioning for each of the planning elements, you are now ready to prepare the Strategic Visioning Profile for your TimeBank.

The Strategic Visioning Profile will be used to:

- prepare the initial **mission statement** for your TimeBank
- prepare an **informational brochure** to promote your TimeBank and the ideas of TimeBanking
- initiate **collection of information** and documentation that will be useful for planning your TimeBank
- **Collating and preparing information for proposals**
- Step toward **planning** for your TimeBank *(Guidebook 3)*
6.2 Guidelines for your Strategic Visioning Profile

Give to us clear vision that we may know where to stand and what to stand for.

Peter Marshall

The Strategic Visioning Profile will give the first formal picture of your TimeBank and must provide convincing and inspiring images and ideas about how a TimeBank fits into your community or organization:

Why do something like a TimeBank ...?  Who can be involved in a TimeBank...?
What could be done by a TimeBank ...?  How could a TimeBank work ... ?

Give careful attention the content and form of the Strategic Visioning Profile because it is the first formal document for your TimeBank and a pivotal document for planning, publicity and strategy.

The Strategic Visioning Profile will be produced in pamphlet or workbook form to be used as a working document. It is an internal document that will be used, along with other available information and documentation for a wide variety of purposes, such as for:

- orientation for new members that come into or work with the team for the TimeBank
- as a source document for preparing key documents and publicity materials
  - Mission Statement
  - Brochures
  - Publicity such as news releases
  - Letters of Interest, Proposals
  - “Elevator Speeches”
- as a framework for start-up planning
- as a foundation document for evaluation
- as a reference for launch and operations
- as a management tool for organization, process and procedures design
- as a standard for performance and learning
- as a living document for periodic revision of vision
A working group will draft the Strategic Visioning Profile based on ideas and working papers generated during the visioning sessions. It is a very important document and will be used for many different purposes. Therefore, it is helpful to remember to:

- Write the document in clear, direct, understandable language.
- Have reasonable points for reference to the future.
- Speak in general terms with specific examples when talking about the community and the long-term goals.
- Address all the planning elements, but give appropriate priority and perspective to those most important for vision.
- Maintain an assets perspective to build on strengths and release possibilities that can become realities.

The Strategic Visioning Profile sets goals and direction. It will be like a guiding star, giving vivid images of what your TimeBank will achieve and what it will be like.

The Strategic Visioning Profile must be inspiring. It must be clear, concise and precise as a communication tool to communicate and motivate people to get involved.

The Strategic Visioning Profile will be a framework for planning. It will set general goals, focus, boundaries and standards which will guide planning build the foundations for action.

The Strategic Visioning Profile should be sufficient, but not long. The vision should communicate the basic ideas for your TimeBank. And avoid gaps that undermine its design and success. It must be clear and concise so that attention is kept in focus on key points of the vision. Brevity with completeness is the challenge for a vision.

The Strategic Visioning Profile gives priority to purpose, scope and strategies, but does not neglect other elements of the vision. Vision focuses on the priority elements of people, purpose, scope and strategies, but does not dismiss logistical elements or evaluation and learning that are also critical for success.
6.3 Consolidating and Synthesizing the Vision

The Strategic Visioning Profile will, as noted in Section 4.3, address all of the nine elements in the “TimeBank Un-Puzzle”. However, keep in mind that attention to greater detail will be undertaken in the planning phase. Therefore, current priorities for visioning are given to the elements associated with the who and why and, to a lesser degree what of the model.

The following discussion is intended to give a sense of priorities and perspectives for a Strategic Visioning Profile.

a) Consolidating and Synthesizing High Priority Elements

The team can begin preparing the Strategic Visioning Profile by consolidating and synthesizing the visioning statements that are created for “people”, “purpose” and “situation.

These elements must produce a persuasive vision about which people and community will truly care. Be sure to highlight desired community future and characteristics, things people really care about, interests and purposes. The vision must present convincing images and ideas about the significance of a TimeBank and generate support.

b) Consolidating and Synthesizing Strategy and Design Elements

The Strategic Visioning Profile must also have convincing statements about the strategy and design elements – the what dimensions of the vision. Strategic vision is critical to purpose, involvement and potential support.

These will need to be consolidated and synthesized within this set and with the previous set of elements.
c) Other Elements

The vision needs to give general statements about the elements related to how dimensions of the Un-Puzzle – resources, finance and timing. The vision statements about expectations for these elements are a set-up for the planning stage in which a great deal of attention will be given to verified and detailed information as start-up plans are created.

Finally, a statement of commitment to evaluation and learning will be an essential part of the Strategic Visioning Profile. The vision needs to emphasize that the TimeBank intends to become a learning institution and is committed to evaluation. If a TimeBank seeks to promote change, it must be open to innovation, learning and change itself.

Thus, each of the “planning elements” constitutes a piece of the puzzle for the Strategic Visioning Profile for your TimeBank. Each will be carried forward as a piece of the puzzle for the planning for start-up which is the next phase toward creating a TimeBank.

6.4 Content for Your Strategic Visioning Profile

Your team will now need to decide upon content and format that will be adopted for your Strategic Visioning Profile.

Keep in mind that the Strategic Visioning Profile is working document because it must be a “living document”. This is a direct outcome of your commitment to your TimeBank being a “learning organization”.

It is likely to be a brief document, ranging from 3-4 pages to as many as 8-12 pages, or more, depending on the nature of your TimeBank, the scope of your vision and the information generated during visioning. Keep it manageable so that it is useful but not overwhelming.
The Strategic Visioning Profile should be written to be relevant for the circumstances of your TimeBank and practical for the purposes and practices you have in mind.

The following is illustrative of a Table of Contents showing how to organize a Strategic Visioning Profile and indicating sections that may be useful in yours.

1) **Background and Context:** Visioning Element – Situation  
   *What’s happening? Why seek changes? What changes?*  
   Introductory statement, background and context  
   Opportunities, assets and challenges

2) **Aims and Objectives:** Visioning Element – Purpose  
   *Why do something? What will be achieved?*  
   Purposes and goals, objectives and desired outcomes

3) **TimeBanking (Co-Production):** Visioning Element – Strategies  
   *How are you going to do TimeBanking?*  
   TimeBanking Methods, Services and Exchanges  
   Possibilities for Community, Co-Production, Change

4) **A TimeBank in our Community**  
   Visioning Element – Design  
   *How to get set up?*  
   Organization plans – location, structure, status  
   Relationships and linkages  
   Visioning Element – Human and Physical Resources  
   *What’s needed to do it?*  
   Expected roles and personnel  
   Office and equipment possibilities

   Visioning Element – Timing  
   *When will things happen?*  
   Anticipated phases / timing  
   Establishing relationships and growth

5) **Costs and Financing:** Visioning Element – Finances  
   *What costs? What financing?*  
   Expected budget levels  
   Sponsors, supporters and financing possibilities

6) **Evaluation and Learning:** Visioning Element – Evaluation  
   *What works? What can be improved?*  
   Performance monitoring and accountability  
   Formative and summative evaluation commitments  
   Commitment to be a learning organization
6.5 Mission Statement

We are limited, not by our abilities, but by our vision.

Anonymous

Initial Mission Statement

The Strategic Visioning Profile is the source document for preparing your Mission Statement. The mission statement should portray the intended image for your TimeBank. Purpose is the heart of the Mission Statement of your TimeBank.

A mission statement is a written form of your TimeBank vision and purposes. It must convincingly present the reasons for your TimeBank, your direction and your purposes. It will be used to communicate to those within your organization, the broader community and the world.

Most important, it will be the inspiration for your TimeBank and its members. Your mission statement should be a short and concise statement that communicates what your TimeBank is, what you want to achieve and why it is significant.

The mission statement draws from your vision and objectives statements to give a good sense of: “Why does the image in the vision exist – for what purpose?”

The initial mission statement is just that … initial. It will change. You will be considering how to refine and amend your mission statement as you go proceed with the next stages of planning for your TimeBank.

Because a mission statement must communicate to diverse audiences, it must give clear and concise sense of image and substance of the TimeBank, what it does, why this is important and how it is of value.

When testing your mission statement, it may be useful to (i) try it with different audiences, (ii) see the impacts and differences of changing one or more words in the statement, and (iii) compare it to mission statements of other TimeBanks to analyze significance of differences.

See examples of Mission Statements from TimeBanks in USA and Canada in Attachment 4, pp. 136-137.
6.6 Next Steps Toward Planning Your TimeBank

We hope that visioning for your TimeBank has been a productive, exciting, learning experience. We also trust that knowledge gained and momentum generated will serve well as you take the next steps toward planning and start-up of your TimeBank. As you think ahead to your next steps, keep the following suggestions in mind.

Records and Resource Materials

Visioning has produced more than the Strategic Visioning Profile. Information generated during discussions and research will be valuable for start-up planning. Be sure to keep files for:

- Information generated while visioning for elements
- Issues identified during vision to be revisited for planning
- Resource and reference resource materials collected
- Contacts and sites for further research or reference

Prepare for Start-up Planning

Once you have prepared your Strategic Visioning Profile, are will be ready to begin start-up planning for your TimeBank. It may be useful to track ideas and highlights of issues that the visioning team has noted and will pass forward to the planning team. A modified version of the TimeBank “planning checklist” (shown on the next page) illustrates this passing forward of issues for planning.

Remember to contact TBUSA to obtain Guidebook 3, Start-up Planning for Your TimeBank.

Consider Requirements for Additional Documentation

The Strategic Visioning Profile, associated documents and records of discussion are valuable for other documentation that will be developed as you move ahead to start-up planning. It may be useful to consider what will be relevant for preparing additional documentation, such as:

- Brochures
- Publicity such as news releases
- Letters of Interest, Proposals
- “Publicity and Speeches”
## Issues for Planning Team Attention

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**Notes:**
6.7. Expanding the Vision - Continuing Discussions

We have said that the Strategic Visioning Profile is a living document. It is meant to be used. In addition to internal planning, it is good to take advantage of the momentum of visioning to continue to expand the understanding, commitment and support for TimeBanking and for the vision beyond the planning team.

The vision is both the “content”, i.e., the form and substance of the Strategic Visioning Profile, and the “ownership”, i.e., those who uphold, value and are committed to the vision.

The experience of forming a visioning team provides a good forum for moving ahead with planning, as noted in Section 6.6. It also provides the channel for continuing to explore and discuss possibilities for TimeBanking in your community and context.

Think of expanding the vision by engaging others who may share the values and desire for changes. Begin with community movers who want to make a positive difference. Seek out both formal and informal leaders who may have a stake or an interest in the success of a TimeBank.

✓ Plan to continue discussions among those interested.
✓ Find ways to bring others into discussions.
✓ Explore ways to use TimeBanking values or try various methods in your lives.
✓ Continue research into TimeBanking and its applications in a variety of settings.

In this way, you are creating parallel tracks to build on and expand the vision, especially the ownership of the vision.

One track is the continuation of a planning team which takes responsibility to move through planning and start-up process for your TimeBank.

The second track is the mobilizing of support within the community among persons who can be motivators and resources persons to join and build the TimeBank.

Both tracks will be critical to the creation and success of your TimeBank.
6.8 Ideas for Final Meeting(s) (Section C)

6.8(a) Purposes of Final Meeting(s)

- to review and affirm the vision for your TimeBank
- to assess if you are ready to proceed with start-up planning
- to identify and assign next steps to begin start-up planning
- to identify ways to expand involvement and support for the vision

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<th>Proposed Agenda</th>
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<td>- Review of TimeBank Profile and Documentation</td>
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<td>- Assignment of final revisions</td>
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<td>- Approval of TimeBank Profile</td>
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<td>- Drafting content for a TimeBank Brochure</td>
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<td>- Plan for moving forward</td>
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<tr>
<td>Summarizing and Looking Forward (20-40 minutes)</td>
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<td>- What we have achieved</td>
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<td>- What we have learned</td>
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<td>- Celebration</td>
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<td>- Next steps and assignments</td>
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Vision without action is a dream.
Action without vision is simply passing time.
Action with Vision is making a positive difference.
Opening the Meeting

Welcome  (10 – 15 minutes)

➢ Welcoming statement.  *At our final planning meeting(s), we will review and finalize the plans for our Strategic Visioning Profile. We will also discuss the way forward and the next steps forward for the start-up and launching of the TimeBank. This is an important step in realizing the vision for our TimeBank.*

Invite comments, e.g., *anything anyone would like to add or emphasize?*

➢ Warm-up: Quotation: *Read a quotation and ask for comments or discussion.*

➢ Purpose Statement (a suggestion)  *Today we will review and make plans to finalize the documentation. After we reach agreement on the TimeBank Strategic Visioning Profile and other materials, we will discuss the way forward to plan for starting the TimeBank.*

Review of Norms

Review the norms and ask for comments, if any.

*Before we proceed, are there any comments or suggestions about how our team is working or anything we need to keep in mind for today’s meeting.*

*Vision without action is a daydream. Action without vision is a nightmare.*

Japanese Proverb

*A vision is not just a picture of what could be; it is an appeal to our better selves, a call to be something more.*

Rosabeth Moss Kanter
6.8(b) Ideas for Topics

❤ **Putting the Strategic Vision Together**

🔍 **Content and Format for Strategic Visioning Profile**

Note the discussion in Section 6.3 about priorities and perspectives for the Strategic Visioning Profile.

Suggested Discussion: Ask members to review their records and notes of discussions and identify the most important ideas, characteristics or factors that should be included in the Strategic Visioning Profile.

Use roundtable discussion methods to share the selected ideas and the reasons for these. Get sense of consensus as discussion moves forward.

Use the discussion to identify key topics for the Strategic Visioning Profile and the tentative priority of the topics for the contents.

Allow time for brainstorming and sharing ideas about the format of the document.

Decide how the draft and final versions of the Strategic Visioning Profile will be written and how these will be reviewed and approved by the group. Plan the process for preparing the Strategic Visioning Profile and assign roles and responsibilities.

❤ **Heart of the Session – Affirming the Strategic Vision**

🔍 **Affirmation of the Strategic Visioning Profile**

Suggested Discussion: It is important that the Strategic Visioning Profile be the result of a team effort and that it have team affirmation. Ask members what more, if anything, needs to be done to show group affirmation of the Strategic Visioning Profile.

Plan for a way to indicate and record affirmation of the Strategic Visioning Profile. Plan to acknowledge this as a significant achievement and take care to record the event and the moment, with photos and celebration ritual as well as final documentation.
6.8(c) Ideas for Activities

Achievement Activity - Review Strategic Visioning Profile

Prepare the Strategic Visioning Profile

We suggest that the members have had opportunity to review the TimeBank Strategic Visioning Profile and supporting materials before the meeting.

The meeting can choose to proceed systematically by asking for comments on an element-by-element basis. Another option is to ask for general and specific comments and address the matters as they are raised.

Take time to review information and observations associated with each of the elements as well as all written materials for your TimeBank vision.

Identify any further work and make assignments for completion.

Achievement Activity - Affirm the Strategic Visioning Profile

Each member needs blank paper.

Ask each member to write a statement they would use to introduce the idea of TimeBanking to someone who does not know about it. This is sometimes called an “elevator speech” which is defined as the time you would have to talk to someone while riding in an elevator together.

Invite members to share their statements.

Discuss the responses. Do you have a shared sense of TimeBanking?

Suggested Discussion: Ask members which of the five core values appears to be most interesting to them and why? Follow-up by asking what an application of this value might look like in your lives or in your community.

If there is time, consider asking each member about another core value and what an application might look like in your lives or in your community.
Achievement Activity - Mission Statement

Discuss and agree on critical assumptions regarding purposes of the TimeBank.

Agree on the major purpose(s) of the TimeBank. Agree on supporting purposes and objectives. Consider how these are related and can be linked.

Write a first drafts **Purpose(s)** and initial draft if a **Mission Statement** for your TimeBank.

Prepare supporting statements and documentation the core team deems useful and relevant.

Achievement Activity - Preliminary Sketch for Brochure

Each member needs blank paper.

Ask the members to write down ideas they have for your TimeBank Brochure.

Discuss the ideas and form general agreement about the brochure content and presentation.

Ask each member to write a statement they would use to introduce the idea of TimeBanking to someone who does not know about it. This is sometimes called an “elevator speech” which is defined as the time you would have to talk to someone while riding in an elevator together.

Invite members to share their statements. Discuss the responses. Is there a convergence of ideas toward a shared sense of what needs to be included in communications about TimeBanking?

Achievement Activity - Team Elevator Speech

**Elevator Speech.** *After affirming the Strategic Visioning Profile, it is a good time to revisit the substance of an “elevator speech” so members are giving the same types of messages about the new TimeBank.*

*Use the process suggested in Section A, Elevator Speech, to let members shape and practice elevator speeches for various situations.*
6.8(d) Focus on Learning

Learning – What have we learned? What more do we need to learn?

Personal and Team Learning from this Experience

Suggested Discussion: Refer to the importance of a TimeBank becoming a learning organization, as discussed in Section A. Emphasize the value of a learning orientation for the team and its significance for the future of the TimeBank you envision.

Ask members to reflect on what they have learned by participating in the visioning experience. It may be helpful to think of learning at different levels, e.g., individually, as a team, for the vision of a TimeBank, and for the community or the organization.

Share the reflections of members, allowing time for discussion of those which are of interest to members. Keep records of important points raised in the meeting.

Reflect on what more needs to be learned for the TimeBank initiative to move forward. Use these notes to carry forward with the planning team.

Reflect on the significance of what has been learned and of having a learning approach to this effort.

Achievements – What have we achieved? What is its significance?

Review of Team and Personal Achievements

Suggested discussion: Review the written products for each of the elements of the “TimeBank Un-Puzzle”. Identify any issues or matters needing attention (i) for completing the final visioning document, and (ii) after the meetings but before or in preparation for any further planning or meetings.

Discuss the significance of the visioning process. What has been learned? Any implications for future of planning for a TimeBank?

Discuss the importance of the achievements of visioning. In what ways will the products be used? How can other be introduced to them?
6.9 Ideas for Moving Forward

Summarizing and Looking Forward

Your greatest resource is your time. There is never enough time to do everything, but there is always enough time to do the most important thing.

Brian Tracy

What we have learned

Suggested Statement: We have been meeting to form a vision for a TimeBank and set a framework for planning to start a TimeBank for our community. The specific goals we hoped to achieve were:

- Knowledge goals: to gain information and knowledge about possibilities of TimeBanking for your community.
- Vision goals: to form a vision for your TimeBank that can be a used as a basis for planning a TimeBank and promoting TimeBanking in your community.
- Action goals: to prepare documentation for a TimeBank Vision Profile that is relevant for your situation and community.
- Mobilizing goals: to create a core cadre of persons committed to TimeBanking and planning for a TimeBank.

Now, let us take time to reflect on what we have achieved. Have the meetings raised our appreciation and understanding of TimeBanking and its possibilities for our community? Share and discuss your thoughts about what we have learned and achieved.

What next?

Suggested statement: Let us reflect and discuss how the sessions have sharpened your thinking about possibilities for TimeBanking and what we will do to begin planning for a TimeBank that will turn vision into reality.

What do we need to do next to get ready for planning for a TimeBank for our neighborhood? Discuss the responses carefully and get good understanding of who would be committed to go ahead, if any, and their willingness to give time and effort for next stage of planning.
If yes, we can:

- begin planning the way forward – Handout: Next Steps for Planning a TimeBank.
- consider who else to involve in forming a core group of at least 8-10 persons to help move forward with the idea of TimeBanking.

If no, is there any other form of follow-up, if any, might be useful?

6.10 Ideas for Celebration

Congratulations! You have given valuable time to develop your TimeBank Vision Profile and supporting documentation. We trust this has been a useful investment for you. Your time is valuable!

Take time to reflect on how you feel about your investment, what you have learned and what can be gained from it.

Take time to celebrate the achievements of the team:

- seem particularly relevant to you and worth remembering;
- are particularly relevant to your community.
- have implications and opportunities for your TimeBank

Help the team find meaningful ways to celebrate the visioning, their achievements and learning gained from the experience.

At conclusion: Ask about anything more you want to share with the group,

Take time to express thankfulness and appreciation with each other.
Assignments, if proceeding to next steps (15 – 20 minutes)

If you wish to proceed to planning, use Handout: Next Steps for Starting a TimeBank, to determine assignments for your team and others who will be asked to join you.

You may find it useful to hold a ‘bridging meeting’ to discuss this assignment and prepare for moving ahead with Guidebook 3: Planning for Your TimeBank.

Order Guidebook 3 from TimeBanks USA – see contacts on back cover.

Evaluation and Feedback

TimeBanks values your feedback on this self-training guidebook. We encourage you to complete and send us the Leader Evaluation Form for feedback to us (See Evaluation Form for Guidebook 2 of Self-Guided Training Series).

If you order Guidebook 3, we ask that submit your completed evaluation form as part of the ordering process.

The future does not belong to those who are content with today, apathetic toward common problems and their fellow man alike, timid and fearful in the face of bold projects and new ideas. Rather, it will belong to those who can blend passion, reason and courage in a personal commitment to the great enterprises and ideals of American society.

Robert F. Kennedy
6.11 Records: Leader Notes of Final Visioning Meeting(s):

Notes about discussions

Meeting(s) _____, date _________________.

*Regarding the Strategic Visioning Profile*

*Regarding achievements and learning*

*Regarding next steps and planning*

*Regarding any other ideas and topics.*
Notes of Meeting (continued): Notes and observations about the meeting

Final Visioning Meeting(s) _____, date _________________.

Effectiveness of the meeting

levels of interest and involvement,

demonstration of understanding,

signs of commitment to move forward

any points of significance.

*** *** *** *** *** *** *** *** *** *** *** *** *** *** *** ***

Overall evaluation of this meeting: Excellent Satisfactory Needs Improvement Other

Comments:

Assess your group’s interest at this time: None Low Moderate Potential Strong

a) Knowledge: understanding of TimeBanking:
b) Vision: ideas for using TimeBanking
c) Action: willingness to consider TimeBanking
d) Mobilizing: engaging in TimeBanking
# List of Attachments

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### Attachment 1: Skills Checklist

**Time Bank Needs and Skills in the Core Economy**

<table>
<thead>
<tr>
<th>Provide</th>
<th>Receive</th>
<th>Provide</th>
<th>Receive</th>
<th>Provide</th>
<th>Receive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Escorting people to appointments</td>
<td>Simple decorating</td>
<td>Providing local knowledge</td>
<td>Companion-ship</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shopping</td>
<td>Simple home repairs</td>
<td>Local contacts</td>
<td>Phone friend</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Doing errands</td>
<td>Gardening</td>
<td>Story telling</td>
<td>Listening</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Horticulture</td>
<td></td>
<td></td>
<td>Visiting housebound people</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Help with form filling</td>
<td>Car repairs</td>
<td>Book-keeping</td>
<td>BabysittingChild Care</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Typing/word processing</td>
<td>Motorbike repairs</td>
<td>Computer skills</td>
<td>Meeting child from school</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Letter writing</td>
<td>Cycle repairs</td>
<td>Printing/Design work</td>
<td>After school care</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Budgeting</td>
<td>Car washing</td>
<td>Surfing the net</td>
<td>Youth work</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sewing/Embroidery/Dressmaking</td>
<td>Organizing social events</td>
<td>Coaching in sports</td>
<td>Basic housework</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Knitting</td>
<td>Helping with social events</td>
<td>Fitness</td>
<td>Cooking</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Woodwork</td>
<td>Running a bar</td>
<td>Fishing</td>
<td>Washing/Ironing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Metalwork</td>
<td>Catering</td>
<td>Wildlife/Nature</td>
<td>Budgeting</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Playing a musical instrument</td>
<td>Teaching reading</td>
<td>Painting/Drawing</td>
<td>Pet care</td>
<td></td>
<td></td>
</tr>
<tr>
<td>D.J.</td>
<td>Adult literacy</td>
<td>Pottery</td>
<td>Dog walking training</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Entertaining</td>
<td>Translation</td>
<td>Craftwork</td>
<td>Plant watering</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Film and video</td>
<td>Teaching languages</td>
<td>Interesting hobby</td>
<td>House sitting</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Giving people a lift</td>
<td>Muscle: Building work</td>
<td>Emergencies</td>
<td>PROJECT WORK</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Driving a car</td>
<td>Muscle: Lifting moving objects</td>
<td>On call at unsocial hours</td>
<td>TEAM WORK</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Delivering brochures</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Driving a van</td>
<td></td>
<td></td>
<td>Join Teams</td>
<td></td>
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</tr>
</tbody>
</table>

Adapted with permission from the FairShares Time Bank in England.
Attachment 2: Circle of Giving

The Time Banking Way
"Neighbors Helping Neighbors"

Lesley helps Helga with her shopping and earns two Time Dollars.

Lesley spends her Time Dollars having Michael teach her how to play the guitar.

Edgar earns Time Dollars by petting Michael's parakeet.

Edgar earns another Time Dollar helping Jose with his taxes.

Kenny, Oscar, and Sarah are paid by Edgar's non-profit to circulate petitions for installing bike paths.

Stanley needs Helga's garden and earns Time Dollars.

Stanley spends that Time Dollar by attending a yoga class led by Lesley.

Deidre earns Time Dollars by watching Stanley and Sarah's children.

Kenny, Oscar, and Sarah spend Time Dollars by attending a community dinner-and-a-movie night.

Lesley spends her Time Dollars having Helga help Rasputin with his reading.

To be continued...
Attachment 3: Co-Production Network Possibilities

Participating Organizations in a TimeBank Network

Faith-based Organizations
- Congregations and members
- Sponsorship of events
- Listen and invite
Organizations carry out mission and increase impacts in community

Community Centers
Provide activities, give credits for:
- Skills training,
- Classes and workshops
- Peer tutoring / ESL, etc
- Child and youth care
- Sports and games
- Group events
- Host clubs
Facilitate interaction, involvement, interdependence

Community TimeBank
Connecting members, different organizations and sectors for needed services, weaving relations, creating community

Social Services
- Developmental programs
- Home-based support
- Elderly, youth & child care
- Tutoring & enrichment
Enlist persons to help each other and build community

Juvenile/Criminal Justice
- Youth courts – jury of peers and learning
- Drug/STD prevention, education, treatment
- Homecomer return, support, references
- Informal support networks for persons
Help integrate these persons into community, build skills, and create success

Arts Organizations
- Artists working in community – after school, community centers, projects, workshops, courses and training
Artists earn, youth learn, more exposure of community to art

Local Business
- Accept credits, discounts or coupons
- Participate in mentoring
- Supplement wages
- Use local source services
Link businesses with non-profits, boost business and loyalty

Public & Private Institutions
Schools
- Cross-age tutoring, mentoring and support activities
City
- Accept for bus tickets
- Sponsor community events
- Volunteer programs and roles
County
- Supplement social and city services
- Community and group affairs/events
- Volunteer programs and roles
Other
Stretch public funds by enlisting TimeBank members, increase accessibility of services
Attachment 4: Illustrative Mission Statements

This attachment includes actual mission statements of TimeBanks at different locations in the USA and Canada. These TimeBanks and their mission statements demonstrate an interesting range and variety of uses of TimeBanking.

We trust this will be helpful as the team prepares a vision and mission statement for your TimeBank.

Echo Park Time Bank (Los Angeles, CA):

“The Echo Park Time Bank is a local exchange system designed to inspire trust and reciprocity. It is a collective working towards empowering the community by facilitating cooperative trade. Time Banking is built on the idea that each of us has unique gifts, talents and resources to share, and that everyone’s time is equal. The EPTB aims to encourage systemic social change, economic equality and community empowerment.”

Arroyo Time Bank (Pasadena, CA):

“Arroyo, which means ‘brook’ in Spanish, is usually a creek bed that fills with water after a heavy rain. In many rural communities, arroyos are the principal roads, and in many urban communities they are important trails that attract people looking to reconnect with a simple more natural time. Just like the Arroyo Seco which runs through the region that our Time Bank serves, the Arroyo Time Bank aims to be a road which brings members of the community together. We want to empower our neighbors to re-evaluate their notions of “worth” and inspire trust, reciprocity, and community through the sharing of our greatest natural resources, our time and spirit.”

Valley Time Trade (Northampton, MA):

“Valley Time Trade's mission is to connect people to untapped resources, provide economic relief, encourage increased community interaction, foster mutual respect and promote equality.”

Cape Ann Time Bank (Cape Ann, MA):

“The mission of the CATB is to build community among a wide range of residents of Cape Ann and to empower them to contribute to each other’s well-being through giving and receiving services.”

Time Trader (Rochester, MN):

“Time Trader connects people and unmet needs with untapped resources by enabling individuals to use their everyday skills to benefit a network of people.”
Dane County TimeBank (Madison, WI):

“The Dane County Timebank is a network of individuals and organizations in Dane County working to increase efficiency, opportunity and resource sharing through mutually beneficial exchange -- building community ties and community self-sufficiency.”

Richland Community Time Bank (Richland Center, WI):

“Creating a community of support for everyone.”

Lathrup Village Time Bank (Lathrup Village, MI):

“Lathrup Village Time Bank is designed to nurture, inspire and motivate a network of neighbors to come together to create a caring and sharing community.”

Phoenixville Area Time Bank (Phoenixville, PA):

“Phoenixville Area Time Bank offers people the opportunity to reach out, ask for help, and discover the joy of sharing their interests and skills with others.”

Community Exchange (Allentown, PA):

“Located in Eastern Pennsylvania, our mission is to invite all people in the community to join in a supportive, reciprocal network where all members are respected and valued for their time and talents, through the sharing of our needs and gifts.”

NDG Time Bank (Montreal, QC):

“The purpose of the Time Bank is to strengthen our core economy, that which values community and support, to empower each other and facilitate new exchanges.”
Attachment 5: Core Values Game

A TimeBanks Training Exercise for Introducing Core Values **or** for Orientation of TimeBank New Members

Instructions for the Core Values Game

1. Place Bendi dolls in basket or bowl and ask each new member to select one. We've provided 10 Bendi dolls in the notebook. If you need more you can add in Bendi babies or other stuffed animals. The point is that using toys helps people relax and have a good time.

2. Handout the half sheet form with one PROVIDE section & one RECEIVE section to each participant.

3. Ask participants to list one to three things their character would like to provide others.

4. Ask participants to list one to three things their character would like to receive from others.

5. Either in small groups or with the entire group have them get to know each other by making as many matches as possible - circulating around the room, meeting other new members. Ask them to write down in the first column of the worksheet the name of the service provided or received and in the second column the names of the people they provided a service for and the names of the people they received a service from. Naturally they are only playing so they will not actually provide or receive the service that day, although ‘future exchanges’ are often prompted by this exercise.

6. Let them know, too, that it is OK to provide a service that they had not listed as one of their top three. And of course, they can receive a service also even though they did not list it.

7. Judge the time by watching the activity in the room.

8. Bring everyone back together and ask the following questions.
NEW MEMBER ORIENTATION – CORE VALUES GAME MATERIALS

Name _________________________________

<table>
<thead>
<tr>
<th>Service Provided</th>
<th>Who did you provide this service for today?</th>
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<tbody>
<tr>
<td></td>
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<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Service Received</th>
<th>Who did you receive this service from today?</th>
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<td></td>
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</table>

After the game is over, explain the five core value in the context of the game. Start by writing each of the core value on the board.
ASSETS.
Referring to the game the just played, ask participants, “If you were able to think of at least one thing you would be willing to provide please raise your hand!”
Hopefully you will see everyone raise their hand. Go to the white board or flip chart (or under poster) and write a big 100% under ASSETS. Everyone has ASSETS. If there is time, share some of the services people were willing to provide. There’s usually a few whacky service offers in the room to give everyone a good laugh.

RECIROCITY
Ask participants, “If you were able to think of at least one service you would be willing to ask for or receive from someone else please raise your hand!”
Hopefully everyone will raise their hand and you put 100% under RECIROCITY on the board. If not 100%, why? Share the importance of RECIROCITY and ask how it feels to provide a service. Typically participants say it feels good. You then explain that is why we should ALL ask for a service as well as give a service because everyone should be given the opportunity to give (as well as receive).

REDEFINING WORK
Ask participants, “What kind of WORK got accomplished today? Who made a match? What was exchanged or did you make a date for an exchange?”
List types of work/exchanges under REDEFINING WORK on board or under poster. List several or just let as many possible be heard to see how many different skills the community has available.

COMMUNITY
Ask participants, “On post-its take a minute to draw or write down how it felt to list your services and requests and then to make exchanges with others.”
Have participants share what they drew or wrote and then have them post them on the wall under the word COMMUNITY so that others can see them at break time.
Explain: Building COMMUNITY is a joyous dance of give and take and building relationships!

RESPECT
Ask participants, “How did it feel to be valued for what they had to offer or if they felt valued?”
Time Banking is a celebration of humanity and diversity. It is about RESPECTING everyone equally (1 hour = 1 time dollar). Celebrate the new members joining the Time Bank!
Leader Evaluation –
Guidebook 2 and TimeBank Visioning Experience

Guidebook 2: Visioning a TimeBank for Your Community

Please respond to the following questions and also provide any other information that reflects your experience with this training guidebook and any suggestions or feedback you have for us.

1. Display an arrow marking starting to concluding (e.g., →) meeting, your group’s growth in interest:
   a) Knowledge: understanding of TimeBanking:
   b) Vision: a realistic vision for a TimeBank
   c) Action: effective visioning & a Vision Statement
   d) Mobilizing: willingness to vision and plan a TimeBank

2. To what extent has Guidebook 2 helped you:
   a) Knowledge goals:
      (i) understand TimeBanking and how it works
      (ii) consider how it applies in your community
            and what it takes to get started
   b) Vision goals:
      (i) develop a vision statement for a TimeBank in your community
      (ii) consider changes and challenges that may be faced in preparing to plan for a TimeBanking.
   c) Action goals:
      (i) envision and write a Vision Statement and other relevant documents
      (ii) begin gathering information and documentation for planning a TimeBank
   d) Mobilizing goals:
      (i) mobilize a visioning team and building understanding and commitment
      (ii) identify persons who will be invited to participate in Level 3, Planning a TimeBank.

3. To what extent has Guidebook 2 helped you envision a TimeBanking for your community and begin thinking about planning for it?

4. To what extent is your group motivated to plan for and promote a TimeBank?

5. Has your group decided to move to Phase 3, Guidebook 3: Planning Your TimeBank?
   Yes    Possibly    Probably Not    No
6. Please share any other evaluation, observations, comments or suggestions about your experience and Guidebook 2.

7. Please share any ideas about how Guidebook 2 and how it could be more useful for you.

Thank you for your evaluation and feedback.
TimeBanks USA
Information and Contacts Sheet

Online Discussion Forum:
It’s free to register! Find answers to many of your questions, or post a new question to be answered by someone in the TimeBanks USA Network. To register, go to http://forums.timebanks.org.

Community Weaver Software:
Check out the trial version while you envision your TimeBank! The trial version is fully functional for up to 20 members. Once you are ready to launch your TimeBank, you can join the TBUSA Affiliate Network and begin adding more members. Go to http://community.timebanks.org/register.php to set up your Trial TimeBank.

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