picture this

a guide to scenario planning
for voluntary organisations

Caroline Copeman

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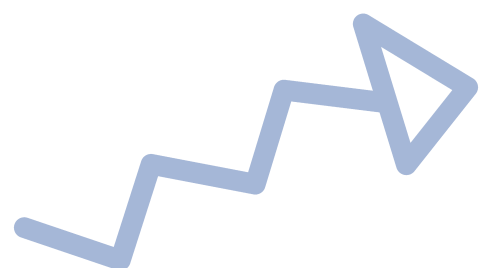a guide to scenario planning
for voluntary organisations

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contents

overview of guide

introduction

Ever since we first sketched out the contents of *Tools for Tomorrow*[1], our practical guide to strategic planning in the voluntary and community sector, we've wanted to adapt *scenario planning tools* (widely used in the corporate world) to meet the needs of our sector.

NCVO's annual strategic analysis publication[2] highlights many of the things going on in our external environment and gives a perspective on likely future drivers for change that we need to consider. We wanted to build this guide to link with that publication, to help managers and facilitators in our sector use the information to add real value to their planning activities. We're really passionate about scenarios – we believe they will make your strategy not just more exciting and stimulating, but also enable you to improve your long-term performance! Scenario planning helps you think outside the box...

Megan Griffith
Third Sector Foresight
NCVO

Caroline Copeman
Centre for Charity Effectiveness
Cass Business School

who is this guide for?

It's designed to be used by anyone (probably in a leadership role) interested in getting their organisation involved in strategic thinking and implementation. It really shouldn't matter about the size of organisation you are in, the stage you are at in your lifecycle, or your specific sub-sector – the material will be relevant and will help you develop robust and effective strategies. There are no pre-requisites around prior skill and knowledge – you just need a commitment to effectiveness and the long term fulfilment of your organisation's Mission.

why do scenario planning?

There's much more on this in the next section, but scenario planning will help you improve your organisation's performance by:

- Stimulating creative activity across your organisation – focussed on your future
- Opening up really big, new opportunities and ideas for improvement
- Drawing in new perspectives (from external as well as internal sources)

1. See the Resources section for more information
2. Again, see the Resources section for more information

style and approach

The guide is intended to be used to help you facilitate the process of scenario development — so it is full of information, suggestions and tips about how you might do this. It's a practical guide with a series of templates and tools to help you plan and run scenario planning workshops, engage your organisation, and build your learning from the process into future strategies.

The guide uses symbols and templates:

This symbol indicates a key point that you should ensure is understood by those involved.

Templates for use as **handouts or flip chart copy** are included for you to prepare in advance of any scenario planning workshop.

Template

We also illustrate **important points** with cameos that you can pass on to colleagues.

Cameo

The cameos come from the experience of Leila Ferguson and West Berkshire Mencap — immense thanks to them and to their local authority West Berkshire Council for sharing thinking and the ups and downs of strategic planning!

what is scenario planning?

thumbnail sketch

Scenario planning is a process of developing a view of alternative futures in order to craft a resilient (supple and durable) strategy. The idea is that if we look creatively at what the future *could* look like and what the major drivers might be, then consider the implications, we can create a series of learning themes or strategies that will be appropriate whatever the uncertainties we may face. *This is a process of anticipating not predicting.*

We see the scenario development process focussed on a workshop (or series of workshops), with pre-planning and follow-up activity.

We used the term 'driver' in the thumbnail sketch above; a well used term but not often defined. Our definition is:

Drivers are major forces or trends that could (positively or negatively) shape or influence the future of your organisation. Drivers have a complex relationship with each other; some drivers are an outcome of others. Some are reasonably predictable; some are uncertain.

Scenario planning for us

"It's all about looking into the future to see what could happen so that you can get all your ducks lined up to meet the challenges!"

– Leila Ferguson, West Berkshire Mencap

fit with other activities

Scenarios are usually developed in a workshop, so they can be seen as another way of stimulating strategic conversation across your organisation, including with external stakeholders. You do need to be ready to take a leap of faith, set off on a journey where you let go of assumptions for a while, and most importantly, be ready to listen and learn. If your organisation is ambitious and ready to get everyone involved in strategic thinking and acting, then scenario planning is for you.

why do it

Here's a list of the sorts of situations scenario planning can help you *turn around*. Work out if any are relevant to you and your organisation – if they are, scenario planning will help you out of the rut:

- We've lost our ambition and sense of urgency
- We are out of touch with what our key external stakeholders are saying
- There's so much that is uncertain, what's the point in planning?
- We are always so reactive
- We're not good at thinking laterally; we need some inspiration
- Why can't we be more certain of what's going to hit us next?
- Our plans are written by a chosen few in a darkened room and bear no relationship to the real world
- We need to involve more people in strategic thinking – get more perspectives
- We all seem to be going in different directions – there's no shared understanding of what we face

Why West Berkshire Mencap tried scenario planning

"Normal strategic planning gets you to focus on what you know or on what is pretty likely to happen; scenario planning gets you to focus on what you don't know – there are times when this can be really liberating – both for your organisation and most importantly for your service users."

– Leila Ferguson, West Berkshire Mencap

when to get started

On the following page, we illustrate the strategic planning cycle from our toolkit *Tools for Tomorrow*[3]. Scenario planning is really a sophisticated **environmental analysis** tool – so you should be using it in stage 2 of the cycle, as you begin thinking about your next plan. Like PEST, once you've carried out scenario planning for the first time you can just keep on updating it – use it as part of your organisational intelligence and context.

3. See the Resources section for more information

The cycle diagram contains the following boxes:

1. **Getting the direction right – periodic**

2. **Environmental analysis – periodic, ongoing and annual; Use Scenarios**

3. **Options and choices – annual**

4. **Planning – annual**

5. **Implementation – ongoing**

6. **Evaluation – ongoing**
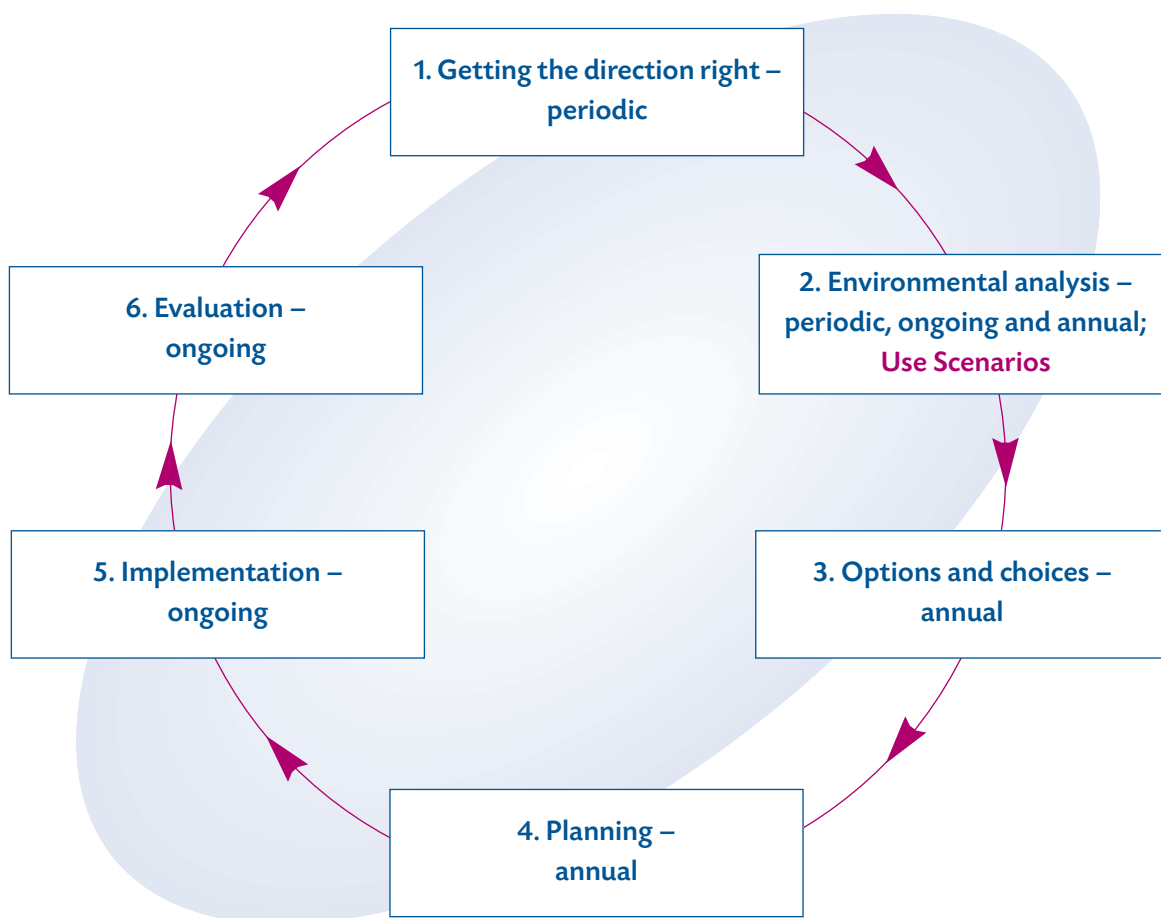
timelines

As scenario planning becomes an integrated part of your strategic thinking, you might well want to invest more time and other resources in it. You could spread the activities we talk about in this guide over a 3 or 4 month period, investing in many days of research, planning and thinking. It is, however, perfectly feasible to do some research in advance, hold a workshop (over a day) and get a few people involved in follow up, so that it's only 3 or 4 days.

Research	Analysis	Narratives	Integrate and Monitor
In advance	Workshop based		Follow up activity

9

who to involve

Involve anyone who has a view on the likely alternative futures for your sub-sector/issue and the work you do. Involve anyone whose interest you want to engage. Involve anyone who you might want to invest in your organisation's future. You need a few experts, a few practitioners and a few who are passionately connected, plus key staff, trustees and volunteers. **Make a list now of all those that fall into these categories...**

Involvement strategies

West Berkshire Mencap thought long and hard about who to involve. Here's a list, along with an indication of the rationale:

- **Senior Management Team** – crucial sector knowledge and for implementation

- **Trustees** – ditto, also for developing ownership, involvement and commitment

- **Staff** – in there at the sharp end; understand a range of perspectives

- **Service users** – a unique and vital perspective; creative ways of engaging are vital

- **Carers** – handpick them as they have a critical view of future needs

- **Volunteers** – don't forget their full skill set, not just what they offer in this role

- **Local authority (officers and elected reps)** – they do this sort of strategic thinking too; let's share and think about contracts and relationships in the future

- **Donors** – it gives them a chance to see what we do as well as have more confidence

- **Partners** – there's a place for everyone to play to their strengths

- **Competitors** – you need to be really brave and share thinking to work out territory

- **Suppliers** – their future is tied up with ours – make it clear what the links are and why it's important to share anticipation of future events. For us, for example, ICT suppliers have a much better grasp than we do about what technology will be doing in 10 years time, we need to be clear about what will become the norm

- **Customers** (including the local community) – what's in it for them to be a part of future planning?

pre-planning

get yourself ready

Facilitation is about making things easy, about assisting and smoothing the process of something. Increasingly we've come to use the term to mean helping a group move towards fulfilling a particular purpose; in this case it is about developing a set of plausible scenarios for the future and drawing some learning from them to feed into plans and strategies.

Think through the following list of facilitator skills[4] appropriate to this task and compare with your own skill set. Don't be too daunted – it's a long list so we've divided it up into fundamentals, then the extras you need to be a really sophisticated facilitator:

Fundamentals

- Accurate and active listening
- Communicating clearly
- Asking questions to help others clarify, explore and move forward
- Providing feedback without creating defensive reactions
- Accepting feedback without reacting defensively
- Developing trust
- Affirming progress and acknowledging completion of tasks
- Providing support and encouragement
- Having patience
- Acknowledging achievement/success

More sophisticated

- Having self awareness and the awareness of others
- Observing and remembering behaviour and conversation
- Understanding multiple perspectives
- Analysing and synthesising issues
- Identifying assumptions

You may need to brush up on some of the above skills – they are all important in any role. Some also come with experience; get a colleague to observe your facilitation and give you feedback on your performance. Facilitating a group is in itself a development exercise and an opportunity for you to learn – keep an open mind and get feedback on how you perform.

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4. Adapted from *The Art of Facilitation: How to create group synergy* and *The Skilled Facilitator* – see Resources section for more information

logistics

Scenario planning isn't a task for someone to complete in isolation. You will need to mobilise resources, engage interest and get people involved. Think about areas where you and your colleagues are not so strong and find others to help you. There is some 'heart and minds' work here as well as some project planning and event planning activity:

Hearts and minds

Take a look at our good practice guide on change management in *Tools for Tomorrow*[5]. The message it gives is that in order to engage people and get their commitment to something new you need to communicate well so that they:

- Understand their role and the benefits (to themselves, to the organisation, to service users)
- Value the outcomes (you will need to show people how they will make a difference)
- Feel they can cope from a knowledge and skill point of view (feel confident enough to participate)

Think about how you can communicate with people to make sure you win hearts and minds – look at when you communicate, what you say, and how you say it; use a range of different media to get the message across.

How West Berkshire Mencap communicated and mobilised hearts and minds!

"Come and help shape the services of your Mencap"

Key messages
- We're all working for the same people; what you're doing, we're doing – let's share; if you're not doing this, you should be – join us
- We want your input – you are a key part of meeting our shared service user needs
- You're important to us (explain why)
- In 10 years time, what will you be doing? How will that fit with what we're doing? How will it fit with what service users want and with what the community can afford? Let's plan together

Key tactics
- Use face to face communication methods for all who are important and/or hard to reach
- Work particularly hard with those who are fundamental – don't give up, and headhunt (be brazen about it)
- Repeat, repeat, repeat the key messages (don't worry about duplication; use different media – newsletters, local radio, personal letters, different people, same messages)
- Get the venue right – it attracts people; make it easy for them to turn up
- Explain what's in it for them if they turn up (sell the benefits)

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5. See the Resources section for more information

Project planning

Once you've read through the guide you will have a good idea about how much time you can invest and what the relevant activities are; draw up a simple chart listing activities, who will do them, and over what time period:

| What	Who	Time

Event planning

You don't need us to advise on how to set up an event, but here's a brief checklist:

- Fix a date for the workshop well in advance so you can make sure you get the key players to attend
- Book a suitable venue (cost is vital, but also participant comfort – these sorts of workshops are mentally draining, so you need to take care of the physical side!); get a catchy invite – remember to have a return slip!
- Draw up an outline of the Workshop Programme well in advance; we've suggested one below that you could adapt and send out
- Get a note-taker (in a small organisation, use volunteers to help organise)

Scenario workshop programme

10.00   **Overview of day and recap on function and features of scenario planning**

10.30   **Debate and discuss driving forces in the environment**

11.30   **Allocate the drivers to the planning matrix**

12.45   **Develop the critical uncertainties into a scenario matrix**

1.00   **Lunch**

2.00   **Narratives**

4.00   **Review, next steps and close**
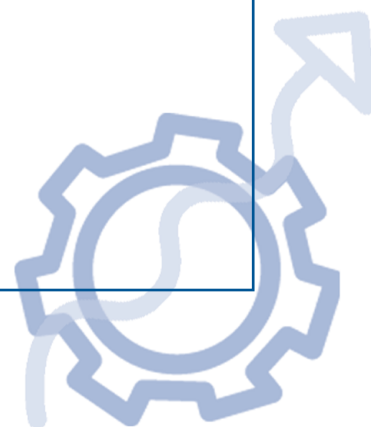
research

You can of course do the research about the external environment at the start of the workshop, but we recommend that you do some pre-workshop preparation that can be sent to participants in advance to stimulate their thinking.

get your focus question

You first need to develop your big focus question and consider how far ahead (in years) you want people to extend their thinking. Involve those who are working with you to develop the strategy (we're assuming a small group of you do this — perhaps the senior management team on behalf of the Board). You need to develop a big important question about your future to focus the mind during the workshop.

It might be broad

- What will the world be like in 10 years time?
- What will our external environment look like in 10 years time?
- What will our organisation have to contend with in 10 years time?
- What will the role of the voluntary and community sector be in 10 years time?
- What will government policy be like in 10 years time?

Or it might be very specific

- What will our service users' needs and expectations be in 10 years time?
- What will the state of funding be like in 10 years time?
- What services will be needed in 10 years time?
- What services will the private sector be delivering in 10 years time?
- What will volunteering look like in 10 years time?

How far ahead you choose to look will depend – it needs to be far enough ahead that people can see imponderables and uncertainties and give a bit of stretch, but not too far that they think the whole exercise is a pointless game. 10 years seems about right... but you need to ponder and debate this to find the right timeframe for your organisation; it might be 5 years or 15...

determine the driving forces

Focussed on the question, you now need to do some research and analysis around the main drivers in your external environment – those things that could play a major part in shaping your future. Look back at page 7 for a definition of drivers.

What trends, challenges, opportunities or threats might impact you over the next 10 years? Some examples of broad areas you could investigate for potential driving forces could be:

- Reform of local government
- Policy on local governance (new localism, double devolution etc.)
- Falling engagement in formal politics
- Rise of single-issues
- Identity politics
- Rise in radical political movements
- Increasing public participation in decision-making
- Ethnic and religious diversity
- Migration
- Growing social-economic inequalities
- Policies on social cohesion
- Decreasing tolerance of social deviance

- Democratisation of media
- Increasing power of the media
- Mixed economy of welfare/policies on choice
- Corporate social responsibility
- Blurring boundaries between different sectors
- Ageing population
- Changing household structures
- Increasing personal mobility
- Rising user expectations and assertiveness
- Sector income (sources/levels)
- Sector income (polarisation)
- Value for money and efficiency agenda
- Government procurement practice
- Personalisation of services

In your research you could use the internet, colleagues' ideas, some interviews with key players and government documents plus scenarios developed by other organisations. NCVO's Third Sector Foresight project is developing an online database of drivers which will be live from Spring 2007.[6]

If you have recently done a PEST analysis (an analysis of the Political, Economic, Social and Technological opportunities and threats in your external environment[7]) you could use this as a starting point and simply take its remit out to a 10 year timeframe. You are seeking what is predictable, what is unpredictable, and what is critical and might have a really big impact on your organisation.

Develop a list of driving forces and circulate this to participants in advance with a note to ask them to ponder what's missing and ignore the fact that they are uncertain about what the future might hold – uncertainties are very valid in this exercise.

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6. See the Resources section for more information

7. See our PEST tool in *Tools for Tomorrow* for a detailed guide on how to do this; the PEST tool can also be found online at the NCVO website at www.ncvo-vol.org.uk/3sf/strategy/?id=2250

Summary of PEST driving forces for West Berkshire Mencap

Political
- Local agenda is driven by national political scene– both need to be considered
- Who might the local councillors be – what will be the implications of their personal agenda?
- Individualised budgets and personal choice will be the main driver – with the resultant impact on the service menu/range (will service users want holidays or education?), on quality (how will that be a consideration to individual purchasers?), on local government contracts

Economic
- Lowest unemployment rate in the country – how will that change? Impacts on pay rates and ability to employ staff on low (affordable) incomes
- How will this affect work based employment opportunities for people with learning disabilities?

Social
- As medical advances improve there will be more survivors and so more people with more profound learning disabilities
- People with learning disabilities will become more integrated into the community/society – the community is seeking greater integration as well as help with knowing how to interact
- Service users too have a desire for more independent living – there will be an increasing need for service providers to be brave and tackle real equal opportunities issues around attitudes/taboos, particularly around friendships and relationships between people with learning disabilities
- Greater opportunities for those with ideas to encourage more real integration

Technological
- Technological advances are changing the face/pace of access for people with learning disabilities
- Transportation – rural West Berkshire – it will become increasingly difficult for people in rural communities to access facilities – what will happen to them?

Some organisations also find it helpful to reference scenarios that other organisations have developed (such as the World Bank or DFID – according to your sub sector). If you find such material helpful it could be used as background reading for your workshop participants.

analysis

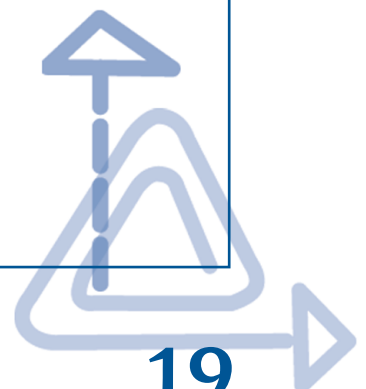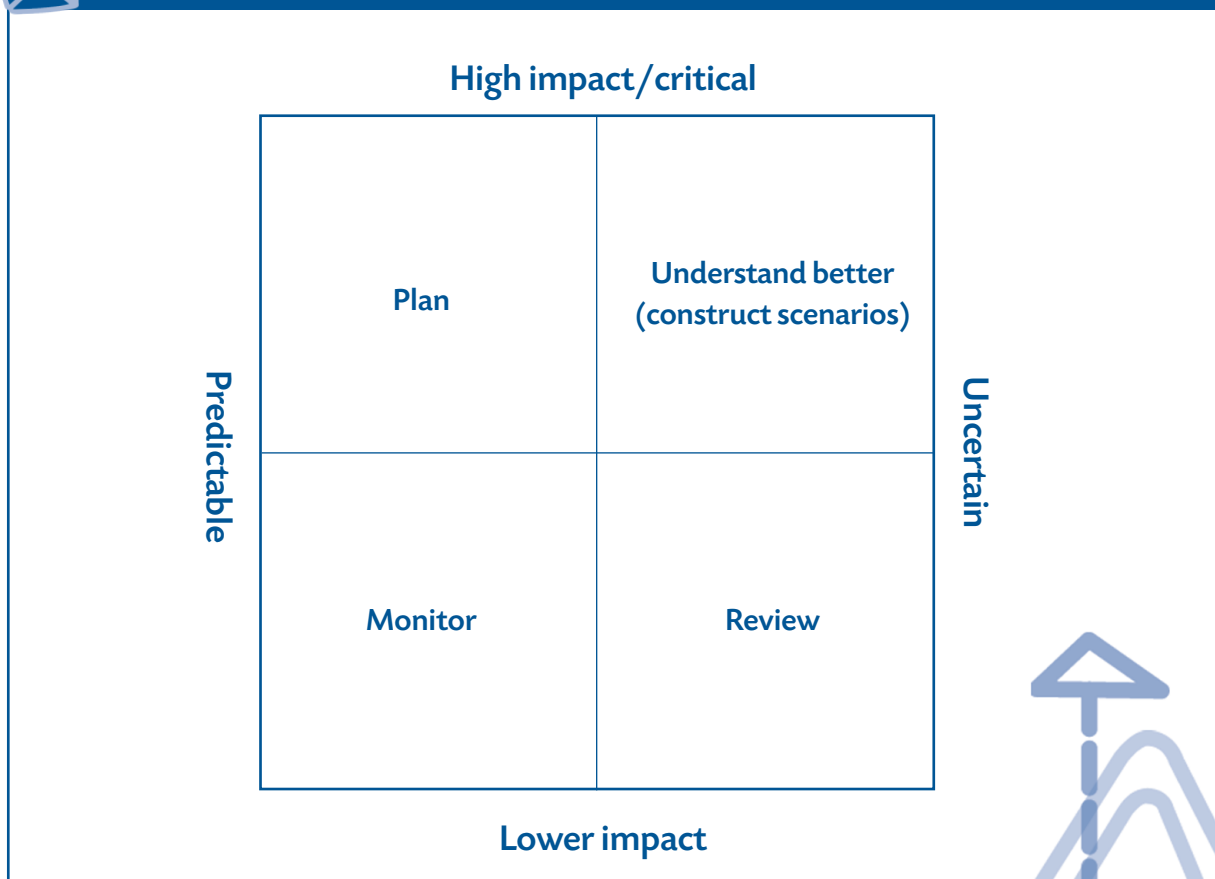## isolate the critical uncertainties

If your pre-planning and research have gone well, your workshop attendees will know why they are there and will have been briefed in advance about the key drivers (opportunities and threats) from the external environment for the next few years. Don't assume that all will have done their pre-reading — have some slides or flip charts ready to explain the purpose and outline the agenda.

You can then begin the workshop by recapping the results of the advance research on major trends and driving forces in the external environment that could shape the future. Get people to add ones they've thought of that are missing. You now need to ask the group (split them up into small teams if you have a lot of participants) to allocate each potential trend or driver to the planning matrix below.

The idea behind the planning matrix is that if a driver is both critical and *certain*, you need to plan for it – so it just gets included as normal in your planning activities. If it's low impact – you just need to keep your eye on it in case the impact changes. If it's potentially critical, but uncertain (could go one way or the other), then it can become the subject of scenario planning. High impact (critical) uncertainties go in the top right box and these become the focus for the rest of the exercise.
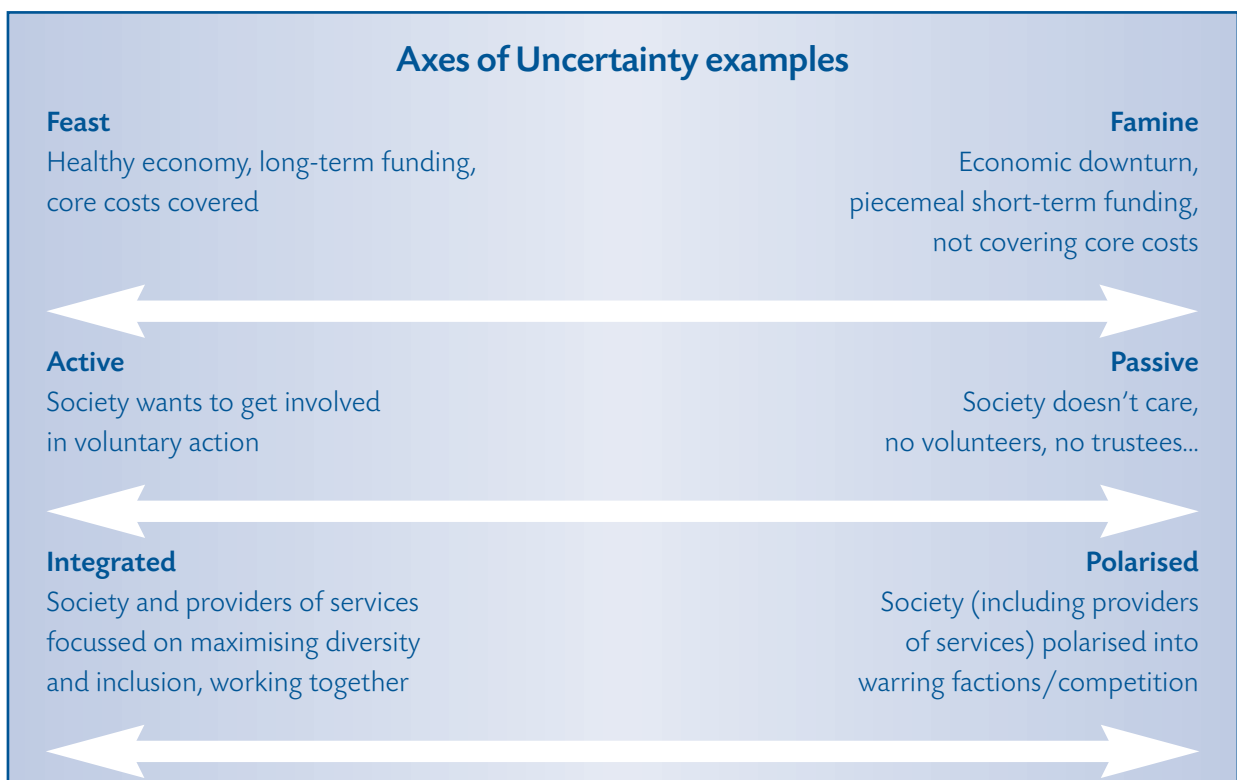
Template

	High impact/critical	
Predictable	Plan	**Understand better (construct scenarios)**
	Monitor	Review
	Lower impact	**Uncertain**

Extract from West Berkshire Mencap Matrix

High impact/critical

Predictable

Uncertain

- There will be more people with more profound learning disabilities
- Growing disparity between rural and town communities

- Level of true inclusion/integration?
- Effect of individualised budgets — how much individual purchasing will really take place versus block L.A. contracts?
- Linked to this, how much monitoring will be put in place to ensure funding is used well?
- Expectation that people will live more independently?

- Getting staff will become more difficult, given low unemployment and ability of the charity to fund desired salary

- Nature and impact of technological advances?
- Agenda of local politicians?

Lower impact

the scenario matrix

The most important element of the next phase of the workshop is for you to encourage the group to unpick each critical uncertainty to create what we call *axes of uncertainty* with the extremes at either end of the continuum. Some see these extremes as reflecting the best and worst case scenarios for each uncertainty. With most things that are uncertain, they could go one way or the other... it's these extremes that will be most useful to you to form the basis of the next step: the scenario narrative.

Axes of Uncertainty examples

Feast
Healthy economy, long-term funding, core costs covered

Famine
Economic downturn, piecemeal short-term funding, not covering core costs

Active
Society wants to get involved in voluntary action

Passive
Society doesn't care, no volunteers, no trustees...

Integrated
Society and providers of services focussed on maximising diversity and inclusion, working together

Polarised
Society (including providers of services) polarised into warring factions/competition
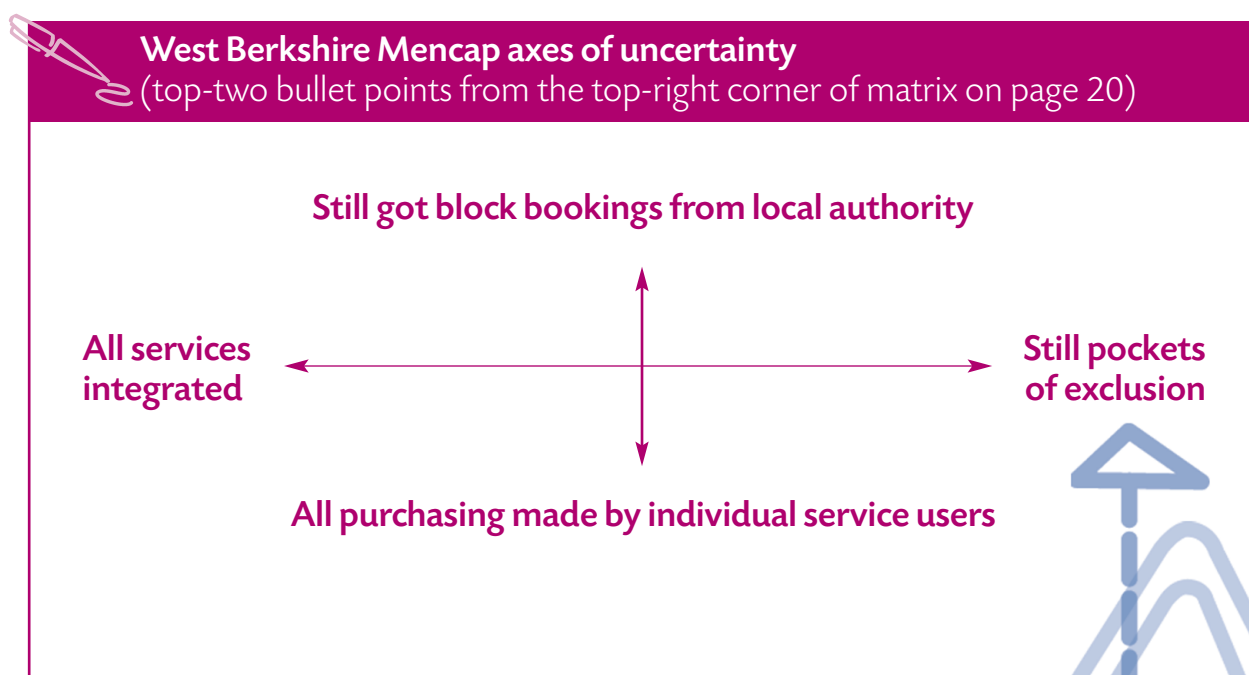
Once you've translated a few of the big issue, very high impact drivers into axes of uncertainty, you can then play them against each other. An example:

Feast, famine, polarised, integrated

Feast

Polarised ←——————————————→ **Integrated**

Famine
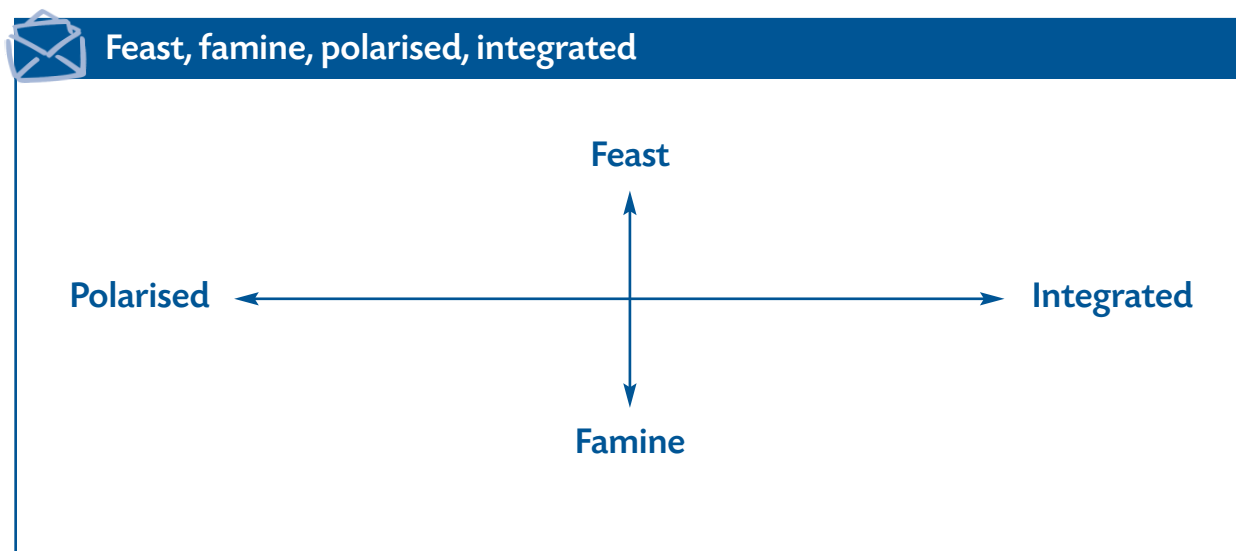
Now is the time to think about how plausible and relevant the 4 potential situations are. Starting top right and working clockwise round the matrix (and remembering that this is just a simple generic example):

- Top right box: Healthy economy with an integrated society
- Bottom right box: An integrated society with serious economic downturn
- Bottom left box: Serious economic downturn with a polarised society
- Top right box: A polarised society with a healthy economy

In each situation, the response for your organisation could be very different...

West Berkshire Mencap axes of uncertainty
(top-two bullet points from the top-right corner of matrix on page 20)

Still got block bookings from local authority

All services integrated ←——————————————→ **Still pockets of exclusion**

All purchasing made by individual service users

scenario narratives

relevant and plausible stories

Your role once some plausible and relevant situations have emerged is to help the participants (in small groups of 4 or 5) create some scenario narratives around each one (try to spread similar types of expertise around the groups). Give each group a different scenario – and get them to consider *the effects* and develop a narrative to tell the story. It's really important that a story is told – i.e. spoken and written.

The story needs to be in response to your 'focus question' – for example, 'What will the world be like in 20 years time?', or 'What will our service users' needs be in 10 years time?'... Let the groups develop their own process for doing this, but wander round to make sure that everyone is engaged; some people find it tough to suspend disbelief and assumptions to this extent, others take to this kind of exercise and go for it! Have lots of flip chart paper around and someone to record.

using organisational models

Sometimes it's easier to get people to explore what could be included in the story by giving them some sub-headings to help their thinking along. Keep a note of these in case things look like they are getting stuck and need a helping hand. We've taken these sub-headings from models and frameworks designed to help us all better understand how our organisations tick[8]:

Some useful sub-headings for the story

- **Service user needs**
- **The funding regime**
- **Key external stakeholders** – who will they be and what are their needs?
- **Strategy** – what will the key priorities be?
- **Product or service portfolio** – what will it look like?
- **Governance** – what will the Mission of the organisation be like; who will be involved, how will their involvement be mobilised; how will decisions be made?
- **Systems and infrastructure** – how will the organisation be arranged; where will you be located; how will you be structured?
- **Human Resources** – core competencies, skills, numbers, ways of working
- **Style** – how will you be working with each other and with external stakeholders; what will your values be?
- **Technology** – what sort of support will you be demanding of ICT; what minimum expectations will your stakeholders have; what will the strategic issues be?
- **Environment** – what will the political, economic and social environment look like? (Powerbases, poverty levels, conflict, ethics, attitudes and morality...)

8. See the Resources section for some signposting

It would be sensible to devote most of the time of the workshop to developing these scenario narratives or stories – maximise the knowledge, experience and creativity of those you have invited to participate. The next steps will be about analysing the stories and developing appropriate strategies. Make sure you make a commitment to feedback and follow up; make sure you stick to the commitment. As an interim, it would be helpful to have each group share their 'best' story.

"...the most 'threatening' scenario"

West Berkshire Mencap decided that the most 'threatening' scenario for the charity was the one in the bottom left box on page 21 – where all services for people with learning disabilities are integrated into the local community, and all purchasing is carried out by individual service users. So they decided to use their workshop time to concentrate on this scenario. What would the impact be? How might the organisation get itself ready and prepare service users?

Possible impact
- Services become more user centred and less group based.
- Users will have more power and control over the services they choose to use.
- Services will need to be more tailored and diverse to meet the needs of each purchaser.
- What role will there be for The Mencap Centre and The Slater Centre? Will these still be a base for activities and, if so, in what way? For example, if statutory day centres are going to be closed or greatly reduced that could mean more people using our services because there are fewer to choose from. However, if a lot of people with learning disabilities are moving to mainstream activities West Berkshire Mencap may have to reconsider current provision.
- More providers may enter the market offering more diverse services to fulfil these needs – this in turn may impact the economics of the services provided by West Berkshire Mencap. Do we need to work more closely with other providers? It will work best if this is done openly and transparently and this requires trust and an ability to see and pass on the benefits.

Actions to prepare
- Work closely with users to develop services they want.
- Work with users and contractors to ensure quality.
- Develop integrated services where homes, employment opportunities, training and leisure activities are provided as an integrated service by West Berkshire Mencap.
- Look at transport links and issues surrounding access to West Berkshire Mencap services and ensure that West Berkshire Mencap is positioned to deal with these issues.
- Look at possible campaigning issues like transport.

Telling the story and looking at possible organisational responses not only clarified that perceived threats were actually great opportunities, but also helped us think through the likely realities and prepare. The preparations will improve effectiveness whatever the future scenario.

integrate change and monitor

look for patterns and insights

The way we're suggesting you organise the scenario planning process is to do some research in advance to help stimulate thinking, tackle the really creative stuff in a workshop, and do some analysis at the end to work out what it might mean to your organisation. You've arrived now at the post workshop analysis phase. You could incorporate some of this activity into the workshop, but people will probably need a break, and it's also one of those things best tackled by a chosen few.

You now need to analyse the stories or narratives and seek out any patterns or insights about the future that they share. Very often the analysis reveals strategies and tactics that need to be adopted *whatever the likely future scenario.*

> ...If you're going to need common core competencies in 10 years time whether you face feast or famine, polarisation or integration, then you may as well start the process of acquiring or developing them now.

> ...If particular stakeholders will dominate whatever the scenario, then make sure you are close, understand their needs and expectations and get them involved now.

Consider the other implications of what emerges from the stories, the potential impact and effects. What can you start to plan for now? What must you really work hard to monitor for the future; keep your eye on? Who must you involve right now in your strategic thinking? Where do you have a choice about the future? How much can you influence? What about contingency planning?

Remember that scenarios are *not predictions or forecasts*; they are stories that help you get closer to your potential future and think laterally and more creatively about it.

Some uses of scenario insights

- Feed insights into your work on reviewing your Mission, Vision and Values to ensure they remain relevant
- Test out your current ideas about strategic priorities and options, about service developments or campaign strategies – do they present a valid stepping stone into a range of long term potential futures?
- Set up 'early warning indicators' of possible future scenarios that would not be good news for your service users, to enable you to contingency plan should the need arise
- When you do your stakeholder analysis, try to carry one out using insights from scenarios – who are the new or likely to emerge stakeholders? Who are the stalwarts who remain throughout? Develop a strategy to respond and understand needs
- Scenario insights will help when considering major growth and/or diversification in your organisation or sector

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develop a learning agenda

One of the most important insights that scenario planning can give you is about the knowledge, skills and social capital you might need in the future. These are all things that take a long time to build and develop.

Consider the understandings that emerge around skills, knowledge and relationships and make sure you develop an organisational learning agenda to take them into account. Think about how your Board will need to adapt and respond; how you can use volunteers to help create a stepping stone. Don't forget too to make optimum use of the diverse range of skills and knowledge you might already have in your organisation – our knowledge of the talent pool at our disposal is often limited to its relationship to our current agenda.

incorporate in strategies and plans

Your analysis of patterns and insights will give an indication of how the new learning can be incorporated into your strategies and plans. Make sure each pattern or insight leads to some *action,* even if it's only a note to keep your eye on a trend... It's vital that you don't allow anyone to get carried away by any scenario – avoid developing plans for each scenario. It's the insights you get from looking across the range of different scenarios that will prove of value and need to be considered for the long term.

Make sure you keep the workshop participants and other stakeholders up to date with the action you've taken – this will keep them motivated for next time.

West Berkshire Mencap – some learning...

- Move out of your comfort zone

- Start from a position of trust and a willingness to learn from each other, underlined by courtesy and common sense

- Work hard to help people suspend disbelief

- Don't try and be too logical

- Have a go and take some risks

- Facing up to worst case scenarios (often not even spoken) gets rid of feeling of impending doom

- We now have a vision to align people to

- Push the agenda with stakeholders in the room – get them to face up to potential futures too; what's the point of being the last one at the feast?

- If we push the agenda now we can help create our future

- It makes us realise that the local authority also want to be part of the work in this area and that we can have partnerships with competitors

- Don't too easily follow the default scenario where nothing changes

resources

analysis of strategic drivers

Voluntary Sector Strategic Analysis

This annual publication from NCVO's Third Sector Foresight project provides an overview of the strategic drivers and operating environment for voluntary and community organisations.

£7.50/£5.25 NCVO members (all NCVO members receive one free copy)
www.ncvo-vol.org.uk/publications

Use the Third Sector Foresight online database

In spring 2007 NCVO's Third Sector Foresight project will launch a new website which will include details of up to 100 strategic drivers for the voluntary sector. The site will be free to use.
www.3s4.org.uk

### Join the Third Sector Foresight Network

The Foresight Network is free to join and members receive monthly updates on strategic drivers, news and useful insight into new thinking. Members also benefit from networking with others in the voluntary and community sector who are interested in strategy and planning.
Visit www.ncvo-vol.org.uk/3s4network or email foresight@ncvo-vol.org.uk to join

more on scenario planning

Free resources

- *What if? The Art of Scenario Thinking for Nonprofits* (Global Business Network, 2004)
  www.gbn.com/ArticleDisplayServlet.srv?aid=32655

- *Strategic Thinking with Scenarios* (Metabridge)
  www.metabridge.com/assoc/stratscen1c.htm

- *Best Practices: Scenario Planning* (TEC)
  www.teconline.com/www/bestpractices/scenario_planning.asp

- *How to Build Scenarios*
  www.wired.com/wired/scenarios/build.html

- *From scenario thinking to strategic action*
  http://horizon.unc.edu/projects/seminars/futurizing/action.asp

- *High Ambitions and Scarce Resources in Public Interest Organisation*s (Global Business Network, 2004)
  www.gbn.com/ArticleDisplayServlet.srv?aid=27797

- *Mapping Public and Private Scenario Planning: Lessons from regional projects*
  (Global Business Network, 2004) www.gbn.com/ArticleDisplayServlet.srv?aid=27802
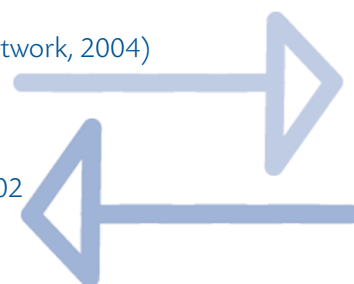
Scenarios bank

We're really keen to develop a 'bank' of scenarios used by organisations in our sector. We would use these to update information on potential alternative futures.

Get in touch with Megan Griffith to join and use the bank by emailing foresight@ncvo-vol.org.uk.

useful resources on strategic planning and facilitation

- *Tools for Tomorrow – a practical guide to strategic planning for voluntary organisations* (NCVO, 2004)
  £35/£24.50 NCVO members
  www.ncvo-vol.org.uk/publications

- Online version of the PEST tool from *Tools for Tomorrow*
  www.ncvo-vol.org.uk/3sf/strategy/?id=2250

- *The Art of Facilitation: How to create group synergy* (Da Capo Press, 1995)

- *The Skilled Facilitator* (Jossey Bass, 1994)

author

Caroline Copeman is the lead author of the highly regarded strategic planning toolkit, *Tools for Tomorrow*. She is a Senior Visiting Fellow at the Centre for Charity Effectiveness at Cass Business School, City University and teaches on their MSc in Voluntary Sector Management. Caroline has 20 years senior experience in the commercial, public and voluntary sectors and has particular knowledge of strategy development and business planning, human resource management, change management, leadership and organisational development.

The Centre for Charity Effectiveness is part of City University's Cass Business School. The Centre offers a broad range of learning and consultancy services to support the development of voluntary and community organisations, their staff and volunteers. The services include:

- Part time postgraduate degrees
- Consultancy
- Mentoring
- Management development
- Learning Network
- Research

The Centre for Charity Effectiveness produces regular e-newsletters updating you with new developments, their latest tools and techniques, tips they've picked up from consultancy work and details of their degree and Charity Talks programmes.

Go to **www.centreforcharityeffectiveness.org** to find out more and sign up to the bulletin.

CITY **Cass Business School**
City of London

acknowledgements
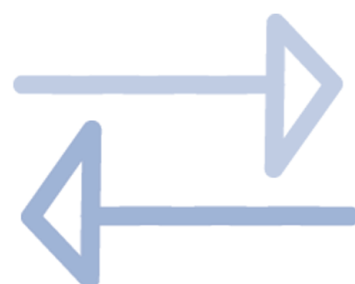
Can you face the future with confidence?

This comprehensive guide to strategic planning is designed specifically for voluntary and community organisations as well as consultants and advisors working with the sector.

Developed in response to a growing need for practical planning tools, *tools for tomorrow* breaks the planning process into six manageable stages. At each stage it identifies the key players and determines the roles of the chief executive, managers, trustees, staff and service users.

ncvo

giving voice and support to voluntary and community organisations

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