

Scenario Testing and Visioning

'Scenario testing's greatest use is in developing an understanding of the situation, rather than trying to predict the future' (Caldwell, 2001).

Introduction

Scenario Testing is a group learning activity. The basic premise can be used more widely in all kinds of settings, whether generating a knowledge strategy paper, (e.g. outline three possible future scenarios for the organisation in the introduction), a workshop, or an email debate. Generally, scenario testing would deliver three scenarios: a positive (or optimistic), negative (or pessimistic), and neutral (or middle-of-the-road) scenario. By actively using 'scenarios', several concerns and outcomes can be addressed at the same time. Participants are able to:

- Identify general, broad, driving forces, which are applicable to all scenarios.
- Identify a variety of plausible trends within each issue or trend (trends that vary depending on your assumptions so you get positive and negative perspectives).
- Combine the trends so you get a series of scenarios (for example, mostly positive trends identified in relation to an issue would give a positive scenario).

Scenarios are a way of developing alternative futures based on different combinations of assumptions, facts and trends, and areas where more understanding is needed for your particular scenario project. They are called scenarios because they are like scenes in the theatre: a series of differing views or presentations on the same general topic. Once you see several scenarios at the same time, you can better understand your options or possibilities (seminar on futures techniques, from the College of Agriculture and Life Sciences).

Visioning is similar to scenario planning. Visioning is a collective exercise, but can also be adapted and used in various other communication activities. The main objective is to make the problem and solution visual. It follows the age-old communication advice: 'show, don't tell'.

Collective visioning exercises, carried out in a group, are used to define and help achieve a desirable future. Visioning exercises are regularly used in strategic planning and allow participants to create images that can help to guide change in an organisation. The outcome of a visioning exercise is a medium-to-long-term plan, generally with a three to five-year horizon. Visioning exercises also provide a frame for a strategy for the achievement of the vision. Alternatively, some visioning tools may be used to promote thought and encourage discussion of future resource use and planning options, without the need to create a future-orientated document.

Detailed description of the process

Scenario testing

- Invite participants who have knowledge of, or are affected by, the proposal or issue of interest.
- Invite participants to identify the underlying paradigms or unwritten laws of change; trends or driving forces and collect into general categories (economy, socio/political, etc.); and wildcards or uncertainties.
- Consider how these might affect a situation, either singly or in combination, using these steps:
 - Review the big picture
 - Review general approaches to future studies
 - Identify what you know and what you don't know
 - Select possible paradigm shifts and use them as an overall guide
 - Cluster trends and see which driving forces are most relevant to your scenario
- Create alternative scenarios (similar to alternate scenes in a play) by mixing wildcards with trends

and driving forces; keep the number of scenarios low (four is ideal because it avoids the 'either/or' choice of two, and the good/bad/medium choice of three).

- Write a brief report that: states assumptions and a future framework; provides observations and conclusions; gives a range of possibilities; and focuses on the next steps coming out of this study. Each scenario should be about one page.

Visioning

In a typical visioning exercise, a facilitator asks participants to close their eyes and imagine they are walking around the organisation as they would like to see it in five years. What do they see? What do the offices look like? Where do people gather? How do they make decisions? What are they eating? Where are they working? How are they travelling? What is happening with external stakeholders? Where is the hub of the organisation? How do knowledge and learning fit into the picture? What do you see if you are a fly on the wall in various organisational settings?

People record their visions in written or pictorial form: in diagrams, sketches, models, photographic montages and written briefs. Sometimes, a professional illustrator helps turn mental images into drawings of the city that people can extend and modify (see: www.vcn.bc.ca/citizens-handbook/2_16_visioning.html). Invite the group to comment on these choices and to discuss what was easy and what was difficult about the process, what they learned, and how they might use the game in the future.

Key points/practical tips

- Use when integration between issues is required.
- Use when a wide variety of ideas should be heard.
- Use when a range of potential solutions are needed.
- Visioning encourages participation for developing a long-range plan.
- Visioning is an integrated approach to policymaking. With overall goals in view, it helps avoid piecemeal and reactionary approaches to addressing problems. Visioning uses participation as a source of ideas in the establishment of long-range organisational policy. It draws upon deeply held feelings about overall directions of organisations to solicit opinions about the future.
- When completed, visioning presents a democratically derived consensus.

Special considerations/weaknesses:

- Organisation of the visioning exercise can be costly.
- Vision can be difficult to transfer into strategy and policy.

Example – Scenario planning: IRC water

A 'trend identification' meeting was carried out at the beginning of 2005 as part of IRC's process of strategic planning. The trends reflected the factors considered the most important to IRC and its vision. To identify these, IRC looked at possible developments in five different fields:

- General development trends, not specific to the water sector but which might have an impact;
- Financial trends in the water sector;
- Implications for approaches to working within the sector;
- Information-related trends; and
- Water and sanitation content trends (a more general analysis).

Factors were initially identified during a brainstorming workshop by IRC staff, and were then elaborated and fleshed out by a small team. One key limitation was been the lack of time to analyse beyond national average data, which tend to hide national variations in key factors. For example, some states

in India are as poor and underdeveloped as sub-Saharan Africa, but this is not evident in the national statistics. Based on this analysis, and drawing on material in the trend analysis, four different scenarios emerged for possible future operating environments for the sector. These indicated a variety of conflicting directions in which the water, sanitation and hygiene sectors could develop in order to achieve the MDGs.

Scenario 1: Business as usual – many gain, many left behind. Strong Dutch support to the sector, predominance of bilateral aid with a strong construction emphasis within the sector.

Scenario 2: WASH dream – but beware of the capacity cowboys. Strong Dutch support to the sector, predominance of bilateral coordinated aid and a strong emphasis on knowledge within the sector.

Scenario 3: SWAPs succeed – but instability and emergencies soak up aid. Strong Dutch support to the sector, increase in multilateral aid and focus on hardware provision.

Scenario 4: WASH nightmare. Dutch disengage, MDGs left in the dust. Little Dutch support to the sector and Africa left to find its own way.

These four scenarios have been written with the intention of being as different from one another as possible, based on a combination of the most important and, at the same time, uncertain trends. It is important while reading to bear in mind that these are just stories – in some cases exaggerated (although not impossible) ones. The question is not ‘are they right?’ or ‘do I agree with everything in them?’ or ‘aren’t they too radical?’ Rather, it is ‘are they possible?’ It is necessary to explore different potential futures to be sure that a chosen strategy (or strategies) is sufficiently robust for an organisation to achieve its vision. If these extremes are not considered, and then some of them happen, it is then that an organisation can indeed find itself badly wrong.

It is also important to understand how the stories were created. The broad lines – the big differences – come from the important and uncertain factors. Into these are woven the other trends – especially the important but certain ones. So, for example, all four stories share a strongly developed Asia, a Latin America that is more or less as it is now, and development in sub-Saharan Africa that is lagging behind. Three reflect scenarios in which the Dutch remain an important sector actor – but with radically different behaviour. A fourth represents a scenario in which the Dutch decide to withdraw from the sector and from aid more generally.

This example is drawn from www.irc.nl/content/download/24277/273359/file/OP41_WASHScenarios.pdf.

Example – Visioning: MYRADA in Andhra Pradesh and Karnataka

One growing application of visioning is the technique of appreciative enquiry. This lets practitioners move beyond traditional problem-centred methods, such as like participatory problems and needs analysis, to identify and build on past achievements and existing strengths within a group or community, establish consensus around a shared vision of the future, and construct strategies and partnerships to achieve that vision. The International Institute for Sustainable Development (IISD) has been doing a great deal of work in applying this visioning tool. One particular project involved working with a partner called MYRADA in two southern Indian states, Andhra Pradesh and Karnataka. The project tested the effectiveness of appreciative inquiry as a method for helping community groups design and carry out projects that contribute to sustainable development and secure livelihoods.

IISD worked with MYRADA and a network of NGOs and community groups, using appreciative inquiry to plan and carry out village-level projects that emphasised the promotion of gender equity, the diversification of income-generating opportunities, and the improvement of local environmental conditions. By working with community groups from three regions, each facing distinct challenges, the project was able to identify and document the most effective methods of applying appreciative inquiry in different circumstances. During the project, over 804 people from 70 different organisations, including some from Sri Lanka, Bangladesh and Burma, received training in appreciative inquiry. The approach generated great enthusiasm and cooperation in developing a group vision built on the

collective strengths and aspirations of its members. It also produced strategic plans by which local people would work to turn their visions into reality. In particular, the tool had an immediate observable effect on participants, and presents great potential as a tool to promote ownership of change processes at the local level.

For more information, see: www.iisd.org/ai.

Sources and further reading

Scenario testing

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Visioning

- Ames, S. C. (1993) *The Agency Visioning Handbook: Developing A Vision for the Future of Public Agencies*, A Hands-on Guide for Planners and Facilitators in State and Federal Natural Resource Agencies, Arlington, Virginia: US Fish and Wildlife Service.
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