



# Complementary Practices that Support the Horizons Foresight Activities: Lessons, Tips and Tricks

The Horizons Foresight Method is supported by a number of complementary values, tools and techniques learned and honed over the years through experience. These include the principles of a learning organization and design thinking, practices in facilitation design and delivery, the use of visual recording, and web 2.0 tools for online engagement.

Others can better explain those practices in detail (see resources at the end), but we would like to briefly draw attention to some useful practices explored at Horizons. Some are subtle general points to remember when designing a workshop, and others are specifics the reader may notice repeated throughout the facilitator guides (such as the use of visual agendas, sticky notes, etc.). Horizons does not use all the following practices every time, but they have become part of Horizons' toolkit. As such, these are ideas worth looking into further for the facilitator using this training manual to deliver a great foresight workshop.

## 7 GENERAL LESSONS

- 1. Use the [wisdom of the crowd](#).** This is essential to foresight research because no one knows the future (and no dataset captures it), but everyone witnesses glimpses of it in their observations of changes occurring. Horizons' publications are the result of many ideas gathered through expert interviews and the group facilitation exercises described in this training manual. Some examples of our crowdsourcing include a scanning community sharing their scanning hits and comments; a group voting on the most surprising or significant outcomes of a discussion; and brainstorming on the question "what if" through a cascade diagram, cross-impact exercise or scenario exercise. Drawing upon a diverse range of perspectives helps to address the biases we all hold in thinking about the future. (For this reason it is important to allow everyone in the group to have a say and to not have one person dominate the discussion.).
- 2. Choose meeting/project participants carefully.** The ideal group for a foresight conversation is knowledgeable about a wide range of subjects, possesses some subject matter expertise and holds diverse perspectives (e.g. as a variety of different stakeholders would, from different branches of government, different levels, etc.). Participants should

be comfortable working with ideas, including the exploration of unproven possibilities and unconventional perspectives. Participants will need the intellectual flexibility to use the analytical brain (e.g. to prioritize, to validate, to challenge) and the creative brain (to imagine, to infer, to brainstorm with others) at different times. We recommend including participants with previous foresight experience as role models for participants new to foresight, as well as a mix of subject matter experts and non-experts. Typically it is easier for people to think creatively and challenge assumptions in areas they are not deeply familiar with. However, it is also important to have knowledgeable experts to help differentiate between the expected and unexpected future, to ground the discussion, and to keep it focussed on the plausible.

- 3. Consider how many participants will be needed.** In our experience, most activities in this guide work well with about 25 people in plenary or 5–9 people in breakout groups when heavier brainstorming is involved. Too many participants can limit how much each person can contribute, while too few participants means the wisdom of the crowd isn't being leveraged. If a scanning and/or foresight project extends over several meetings, we strongly recommend using the same participants (and facilitation team) rather than involving new substitutes. Foresight conversations are layered over time, culminating in a complex synthesis of ideas at the point of the final scenario exercises. To be discussed, these ideas must be understood. Participant attrition can be a problem for longer projects (e.g. months), so consider what will motivate people to join and remain with the project. Careful planning can help ensure participants aren't meeting more often or longer than necessary (see #7 under specific tips).
- 4. Use the right tool for the activity.** Traditional meetings often suffer from the familiar format of a general conversation around a table, guided by a chair, with goals that may or may not be clear and a process that is even less so. The frequent result is unequal participant engagement and time spent on a process that may not satisfy the goal. A [learning organization](#) seeks to meet its goals through the appropriate use of structured [processes](#) that suit each objective and support the full engagement of participants. Whether the objective is to build trust, invite feedback, brainstorm new ideas, evaluate options, make decisions, seek agreement, etc., there are many effective facilitation processes available. Horizons frequently uses facilitation tools such as [ice breakers](#), [affinity mapping](#), [interview matrices](#) and feedback tools.



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- 5. Consider what activities can be done without a meeting.** While some goals are best addressed face to face, others are better accomplished outside the meeting, as homework. Horizons has experimented with social media tools such as Jive, Shaping Tomorrow, Mind42 and Pearltrees to crowdsource weak signals from our participants, comment and build on others' findings, and vote on importance. While online activities create continuity between meetings, they are not a substitute for face-to-face events: it takes the maintenance of offline relationships to sustain online activity. This is what Horizons refers to as the [heartbeat model](#).
  - 6. Attend to different learning and participation preferences.** Traditional meetings work well for participants whose lead learning mode is listening (hearing a presentation or discussing ideas). Yet most people ([an estimated 65%](#)) are primarily visual learners. To better engage these learners, try including visual agendas, posters, [visual recording of conversations](#), highly visual presentations, maps, cascade diagrams, and a guided imaging exercise. For kinesthetic learners, activities that involve writing, getting up to review or add to results on a wall, or voting on key points can help. Horizons is experimenting with [experiential futures](#) and [game development](#) to open up more varied ways to facilitate participant interaction with content. A good engagement strategy also considers how both extroverted and introverted participants prefer to contribute, allowing time for both discussion and reflection (more on this below).
  - 7. Expect facilitation design to take time and improve with practice.** A general rule is that it takes about 3–4 hours of planning and preparation for every hour of facilitation in the room. This guide is intended to help manage that time, but there is always a degree of customization required to facilitate a group. Furthermore, Horizons is constantly innovating to improve upon the process and learn from past experiments. [Design thinking](#) suggests that the steps in a good innovation process are to design, practice, evaluate and improve upon an initiative. The facilitation team can consider regular after-action reviews as part of the facilitation design process.

## SPECIFIC TIPS AND TRICKS

- 1. The relationship with participants begins before the meeting.** Facilitators can begin to build rapport with participants and create interest in the meeting by engaging through email. That email can give participants an idea of what to expect and pose a pre-meeting question to consider. As mentioned previously, the facilitator can also use social media to follow up after a meeting.
- 2. Design the space to suit the objectives.** Theatre-style seating directs participants'

attention to a speaker in front of the room, while participants seated in a circle emphasizes the conversation they are having with each other. If it isn't essential for all to hear the same conversation, small groups working simultaneously can generate content much faster than a single large group conversation. Opportunities for discussion in pairs or small groups can also change the pace of an activity and draw out quieter participants.

**3. Use a visual agenda in the room to set the tone that this meeting will be different.**

Visuals made specifically for the meeting invite participant appreciation of the time and effort the facilitation team spent planning. An agenda with a little colour and whimsy can also put participants in a headspace suitable for creative brainstorming when it is needed. It also reminds participants when the breaks are, so they don't feel the need to leave the meeting for a bathroom break.



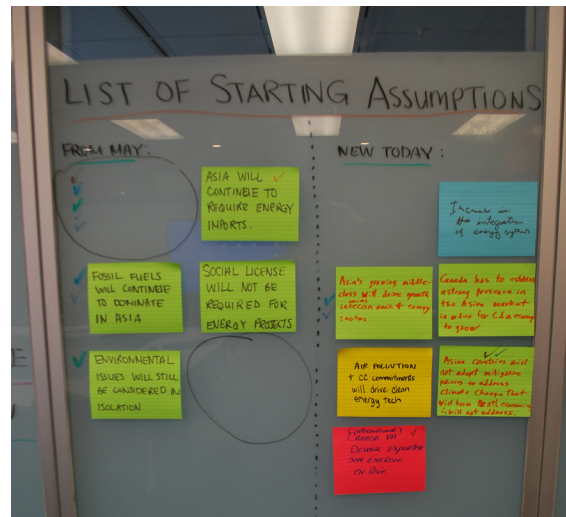
**4. Use an ice breaker to help warm up the room.** It doesn't need to be silly; some can be very topical, and get the content of a meeting started in a light way. For our Future of Asia project, we asked participants to introduce themselves to the group by selecting one image (from a collection on the floor) that represented a vision of the future of Asia that they were expecting and using it in a sentence.

**5. Determine rules of engagement to create a space for good discussion.** This is another way to build rapport among group members, particularly if they will be meeting recurrently. It reminds participants that all our time is valuable and helps the group come to an agreement on what respect for others looks like. It also reminds us that we are all responsible for a good discussion. While some rules may seem obvious, it is important that participants agree to them. Some rules generated in the group may be less obvious (e.g. Are smart phones allowed in the room? What are our expectations if participants leave early?). A draft set of rules can be presented to participants, to seek additions and agreement, or it can be generated by the group as a facilitated exercise.



6. **Note that a facilitator is different than a chair.** The facilitator establishes the goals and process for a conversation, but is neutral to the content generated. In contrast, the chair of a meeting has a stake in the conversation and may offer opinions or make content decisions on behalf of the group. If the facilitator has an opinion, one way to share it without abusing power is to symbolically demonstrate that they are removing their facilitation hat, e.g. by saying so, or by literally capping the marker that was recording the conversation. If a conversation is getting off track, the facilitator can also invite facts, other opinions and methodologies to address an issue and get back on track.
7. **On the other hand, consider what content roles a core team of facilitators could have.** Here Horizons deviates from standard facilitation practice. For an ongoing foresight project with key milestones, it may not always be practical to have a group of participants deeply involved in every decision. It may be possible for a core team of facilitators to make some judgments on behalf of the larger group. If so, it is important to explain what work was done and give participants an opportunity to revise those decisions. For example, in setting up a scenario exercise, a small team of Horizons facilitators will often frame the scenario logic before participants enter the room. Placing some boundaries on the scenarios supports a good discussion that doesn't swing too wildly in conflicting directions. At other times, a core team might do some initial filtering or synthesis of previous content to ensure a productive conversation at a follow-up meeting, or complete an exercise that participants could not complete within the meeting time.

- 8. Allow for moments of reflection.** Horizons facilitators will often use sticky notes in brainstorming activities; this invites participants to quietly reflect and write down ideas before sharing them with the group. Not only is this step appreciated by introverts, it is also productive to have all heads thinking quietly at once.



- 9. Change the pace of activities.** If participants have been sitting for a long time, let them stand and move around. If they have been receiving information through a presentation, switch to a discussion. If one activity involves sticky notes for brainstorming, avoid sticky notes for the next activity.
- 10. Include time for breaks in the agenda.** Participants will generate better content if they have time to take a break now and then. A good general rule is to allow a 10-minute break for every hour in session. These not only give participants a rest, but can be timed to allow facilitators to reflect on whether the meeting is on track or set up the next activity. Planning for a long break in the agenda also creates a buffer that can be shortened if need be.
- 11. Know what degree of agreement is needed for an activity.** Sometimes it's ok to agree to disagree. Divergent views might even be a desired outcome, for example when we invite competing future possibilities in a cascade diagram exercise or seek alternative assumptions. Even when some agreement is necessary to proceed with a step, there are different levels of agreement possible. Consensus is a strong requirement for agreement, while other times a majority vote or simply the most popular option is sufficient. We use voting in workshops to get participants to evaluate the content they are generating (e.g. What were the most important assumptions generated? What was the most surprising outcome in a cascade diagram discussion?).

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**12. Use visual recording techniques to build a shared memory of a conversation and allow meta-thinking.** When people see their words, they feel heard. A visual recording also keeps the discussion on track. Horizons uses writeable walls, flipcharts, large poster paper, computer projection screens and smartboards to track participant conversations. Where possible, we use clear lettering and zebra striping, map relationships and processes, and draw simple icons and occasionally a visual template. After a conversation is recorded, we sometimes refer back to the product, inviting participants to step back and review it to ensure accuracy, vote on important points, or otherwise assess their findings.

**13. Learn from participants through timely feedback at the end of a meeting.** For regular Horizons events, we have an evaluation form for accountability and to track our progress against a standard set of outcomes. There are also simple ways to capture feedback very quickly. For one-off events, we often simply ask participants for a [plus-delta](#): on their way out the room, they post one sticky note for what worked in the session and another for what they would change. It's quick and often very instructive.

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## ADDITIONAL RESOURCES:

- Wisdom of the Crowd:
  - The Wisdom of Crowds ([https://en.wikipedia.org/wiki/The\\_Wisdom\\_of\\_Crowds](https://en.wikipedia.org/wiki/The_Wisdom_of_Crowds))
  - Real-time Delphi for getting numerical estimates from a group, such as quantities at a certain date or by what time an event is likely to happen (<http://www.millennium-project.org/millennium/RTD-general.html>)
  - Social bookmarking tool: <https://www.diigo.com>
- Facilitation:
  - Facilitating Effective Group Discussions: Tips (<https://www.brown.edu/about/administration/sheridan-center/teaching-learning/effective-classroom-practices/discussions-seminars/facilitating>)
  - Facilitating Group Discussions (<http://web.stanford.edu/group/resed/resed/staffresources/RM/training/facilguide.html>).
  - Open Space (<http://openspaceworld.org/wp2/>).
  - World Café (<http://www.theworldcafe.com/>).
- Design Thinking:
  - The IDEO Facilitators Toolkit (<https://www.ideo.com/work/human-centered-design-toolkit/>)
- Learning Organization Community of Practice:
  - Tools For Leadership and Learning ([http://www.managers-gestionnaires.gc.ca/documents/toolkit\\_e.pdf](http://www.managers-gestionnaires.gc.ca/documents/toolkit_e.pdf))
  - The Fifth Discipline ([https://en.wikipedia.org/wiki/The\\_Fifth\\_Discipline](https://en.wikipedia.org/wiki/The_Fifth_Discipline))
- Visual Recording:
  - The Grove Institute (<http://www.grove.com/>)

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