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Advancing Association and Nonprofit Leadership

Research Brief

Why Associations Need Foresight

by Marsha Rhea, CAE

How often are you able to devote time to thinking about the long-term future of your organization? Have you considered how your association's situation could change as society changes, the economy adapts, and technological advances provide organizations with new ways of doing business?

To help association professionals think about how to lead their organizations into the future, the ASAE Foundation has launched ASAE ForesightWorks. This program is a deliberate, evidence-based research initiative and emerging line of products designed to assist association professionals in environmental scanning and planning for change. The program is designed to provide a continual stream of intelligence and resources about anticipated trends. Its mission is to empower association leaders to create a culture of foresight in their associations—not only through research findings, but also by giving leaders the tools and processes they need to practice scanning on their own. The findings will be shared not in a one-time publication of resources, but with a regular release cycle of updated analyses, related tools, and opportunities to engage.

The idea of future-focused research is not a new one. ASAE has been researching trends and potential disruptors affecting the association community since the 1990s. ASAE ForesightWorks was initiated in 2016 with guidance from the ASAE Foundation's Research Committee, which is committed to establishing an ongoing foresight program to identify trends and issues affecting the future of associations and the professions, industries, and causes they serve. The foundation

is teaming with futures consulting firms Signature i and Foresight Alliance to create a practical and actionable flow of relevant foresight research.

THE VALUE OF FORESIGHT

ASAE ForesightWorks is grounded in the concept of foresight, which is a systematic, multi-stepped process for discerning, analyzing, and acting on potential futures. Future-focused activities like environmental scanning play a key role in the foresight process. Many association professionals already practice foresight, frequently in connection to one of four goals:

Source: Signature i, LLC

1. **To support strategic planning and strategy development.** Association leaders generally recognize that environmental scanning is a necessary precursor to effective strategic planning. Fewer leaders recognize the need to look out five to ten years ahead to anticipate change. Associations are more likely to do more comprehensive scanning and scenario planning when they are creating or updating their vision to set a strategic direction. However, a traditional SWOT analysis (an analysis of strengths, weaknesses, opportunities, and threats) only provides an assessment of current performance and not of what must be done to prepare for tomorrow's opportunities. Performing a systematic environmental scan helps participants focus their plans for the future.

2. **To inform anticipatory learning.** Members value content that keeps them apprised of changes in their field. They expect their associations to offer topical conference and webinar experiences, and to report on timely topics in their publications. Association professionals must be aware of the trends and changes that will affect their members in order to produce these types of relevant materials.

3. **To conduct risk analysis.** Association leaders have been effective at identifying issues that can lead to public policy and regulatory changes, especially when they have staff dedicated to these activities. They have also been successful in confronting new developments that affect businesses of all types, including information and communication technologies and generational shifts. However, leaders have been less proactive in assessing potential vulnerabilities in their business models and operating practices.

4. **To inspire innovation and business development.** Businesses frequently use foresight to spot trends and anticipate future markets. As associations strive to be more innovative, they, too will be able to use foresight to see beyond today's issues and identify new capabilities that can turn "what if" ideas into real possibilities. Associations can use foresight to recognize and build on technological advances or changes in customer priorities and preferences. In doing so, they will be better able to see emerging opportunities to do things a new way.

RESEARCH METHODOLOGY

To provide the association community with the resources to perform foresight effectively, a team from Signature i and Foresight Alliance developed the ASAE ForesightWorks research program. An advisory group of ASAE members, staff, and other volunteers has also helped design the program, analyze the research findings, and develop products and tools to serve the association community. The ASAE

ASAE Foundation STEPB Scanning Framework & Domain Map

Source: ASAE ForesightWorks

Foundation is sharing its process as a replicable model and program that other associations can emulate as they develop foresight programs focused on their members' specific interests.

Signature i and Foresight Alliance followed a systematic process based on foresight best practices to generate and analyze change drivers of potential significance for the association community. To start, the research team, working with a pool of association volunteers and one-on-one interview participants, created a domain map to frame their environmental scanning, scanned extensively, and used a number of analysis processes.

Domain map. A domain map identifies elements of a system and potential areas of change affecting a subject (company, industry, organization, field). To create this domain map, the research team examined typical association operations and interviewed ASAE members and staff about how association operations are changing, where change is needed, and what ideas about the future should be researched. The domain map identified "hot zones" of active or potential change and became the guide for the environmental scan.

Environmental scan. An environmental scan is a method for monitoring trends and forces affecting the ecosystem in which an organization operates. It differs from conventional, idea-specific research in that it is wide-ranging and meant to support ongoing processes of change monitoring. To organize and ensure breadth of coverage, the research team scanned systematically in STEPB categories—society, technology

and science, the economy, politics, and business. The scan reviewed dozens of source types, including interviews, news articles, academic papers, expert blogs. This scan yielded the collection of more than 300 trends and forecasts deemed by Foresight Alliance analysts to be relevant to the change zones defined by the domain map.
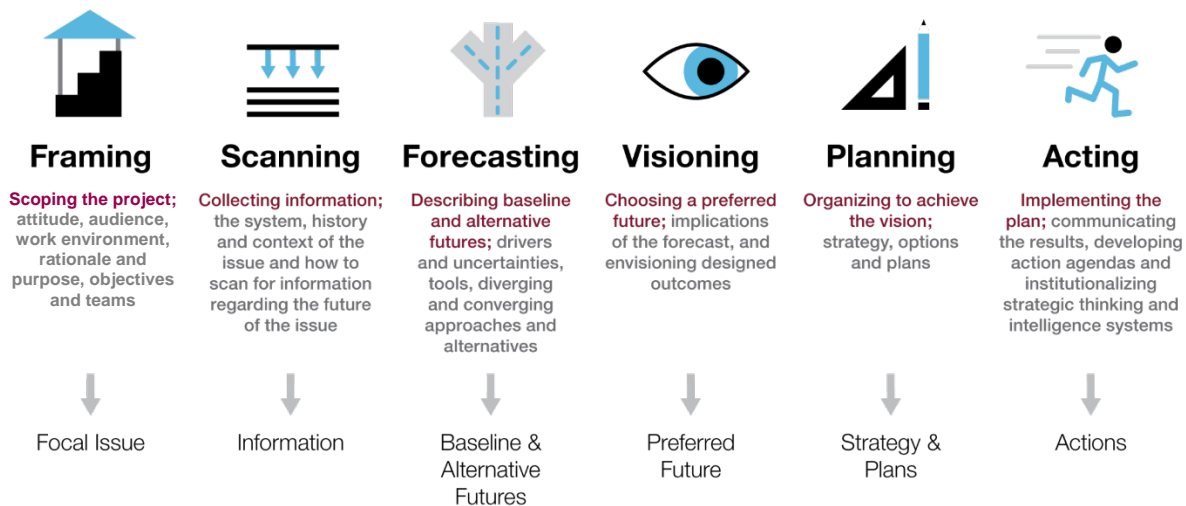
Identification of drivers of change. Foresight Alliance futurists then took the over 300 items and clustered them to draw out larger, overarching ideas. This process revealed more than 100 clusters that could be explored as potential drivers of change. A ranking and rating exercise narrowed the list to 60 and Signature i then culled the drivers of change topics to 41. This list of 41 was passed to the ASAE Foundation Foresight Program Advisory Group, who reviewed and ranked them for their relevance to associations.

Documenting and analyzing the drivers of change. The research team analyzed each driver of change to understand its long-term implications, key unknowns, and potential forecasts. A pool of ASAE volunteers assisted in analyzing the drivers of change and identifying potential action steps associations might consider. These analyses were then used to create action briefs, concise guides to each driver of change (see the Orientation to the Action Briefs section to learn how to interpret and apply the research presented in the briefs).

EMPOWERING ASSOCIATION LEADERS TO PRACTICE FORESIGHT

A primary goal of the ASAE ForesightWorks program is to provide association leaders with a systematic process for foresight that can be easily integrated into other strategic planning processes. The process used by the research team offers six steps, from defining the key questions to taking action.

1. **Framing** the foresight project ensures a manageable project scope and purposeful outcomes. What information is needed, who needs to know, why is it important, and what needs to be done with the information collected?

2. **Scanning** is the data collection phase. It involves a systematic search for the patterns of change across a variety of data sources and resources. Scanning also includes identifying the context for and relationships between potential changes to organize the scan results into meaningful information. A domain map is a helpful guide for this step.

3. **Forecasting** is the process of thinking through potential futures. How might this pattern of change affect how work is conducted? What are positive, negative, and ideal possible futures connected to this change, and what are the implications of each? Thinking about the range of future possibilities is important, although eventually informed assumptions will have to be made to guide visioning and planning.

Framing	Scanning	Forecasting	Visioning	Planning	Acting
Scoping the project; attitude, audience, work environment, rationale and purpose, objectives and teams	**Collecting information;** the system, history and context of the issue and how to scan for information regarding the future of the issue	**Describing baseline and alternative futures;** drivers and uncertainties, tools, diverging and converging approaches and alternatives	**Choosing a preferred future;** implications of the forecast, and envisioning designed outcomes	**Organizing to achieve the vision;** strategy, options and plans	**Implementing the plan;** communicating the results, developing action agendas and institutionalizing strategic thinking and intelligence systems
↓	↓	↓	↓	↓	↓
Focal Issue	Information	Baseline & Alternative Futures	Preferred Future	Strategy & Plans	Actions

Source: *Thinking about the Future* by Andy Hines and Peter Bishop (2015: Hinesight)

4. **Visioning** sets the future direction. After thinking through the possible futures that could result from the identified changes, it is important to identify the preferred vision to set clear goals. Associations need visioning at critical turning points in their industry or profession. Without clear vision, it can be easy to lose sight of what needs to be accomplished. The most compelling visions come from asking challenging questions, such as, "Who do we want to be," "How we can better serve society," and "What will be our highest contribution to the future?"

5. **Planning** requires leaders to identify actionable steps to make their vision a reality. Plans set the course for getting to the preferred future defined by visioning. Almost all associations make planning a priority, but often the focus remains on a near-term time frame of one to three years. Scanning and forecasting the future out as far as 10 years is an important exercise in making more strategic decisions in the near term. Planning for that ten-year horizon puts the association in a position to work toward the preferred future and meet potential challenges.

6. **Acting**—turning the theoretical preferred vision of the future into the association's reality—is arguably the most challenging part of the process. The vision and the plans must be effectively communicated to all stakeholders, champions must be recruited, and actors in the process must buy in to their roles. As foresight becomes a regular part of an association's strategic planning process, acting on the results will become a more ingrained part of the organizational culture.

Future products from ASAE ForesightWorks will focus specifically on helping association leaders use and apply foresight practice as part of their planning processes.

USING THE DRIVERS OF CHANGE

The research identified 41 drivers of change that are particularly relevant at this time to the work of associations. In future years, the ASAE Foundation will continue to update, add to, and remove drivers of

change, enabling associations to focus their attention on a curated set of actionable research topics. Many drivers of change will be relevant to a range of industries and professions, and even to society as a whole. The research team analyzed each driver of change to understand its long-term implications, key unknowns, and potential forecasts. A pool of ASAE volunteers assisted in analyzing the drivers of change and identifying potential action steps for consideration. These analyses were collated and documented in action briefs for the association community.

The first three drivers of change action briefs—Aging World, Anticipatory Intelligence, and Virtualized Meetings—are available free to ASAE members. Additional tools and resources will be made available by early 2018, including 38 additional action briefs. These briefs are designed as quick references and conversation starters to focus associations on the opportunities and challenges to consider. The action briefs can be applied to the work of associations in the following ways:

- **Inspire a new vision.** Use the drivers of change to identify how significant changes in the future could interact to create new opportunities for an association and its membership. Examine effective responses to these changes.
- **Jumpstart strategic conversations with the board.** An effective board should be regularly identifying and discussing emerging trends and issues for the industry or profession when discussing the organization's strategic direction. Introducing the drivers of change to the board can spur discussions on potential impacts.
- **Identify the issues that matter to members.** Test the potential impact of drivers of change with surveys, focus groups, town halls, and online discussions with members. Use the results to prioritize important changes ahead.
- **Engage your members.** Explain how the potential impact of the drivers of change may affect members in different ways. Highlight members who are pioneering responses to these changes. Organize educational experiences that delve into the implications and co-create solutions and responses.
- **Stress test your business model and business practices.** Guide staff through an exercise identifying vulnerabilities related to the potential effects of the drivers of change. Prioritize the areas where strategies and practices need to be updated to succeed in future conditions. This is sound risk management that will minimize surprises and the need for crisis management.
- **Plan for technology investments.** A number of drivers of change point to the need to update association technologies. Examine where potential changes intersect with the technology the association relies on, and look at technology that might improve operations. Use this research to build plans and budgets to invest in essential capabilities.
- **Scan for innovative opportunities.** Change creates new needs and brings opportunities for new programs and services. Use the foresight research to spot and test the viability of new products, services, or even internal functionality.
- **Start a conversation with peers.** The research volunteers found that they better understood the drivers of change and their potential for affecting associations when they discussed the potential changes with their fellow volunteers. Conversations highlighted potential advantages or vulnerabilities volunteers missed on their own or brought an illuminating perspective to their understanding of the potential change.

Working with the Drivers of Change: Orientation to the Action Briefs

Overview page (page 1). This page can serve as a standalone overview of the driver of change or as an introduce to the other pages. It includes:

- **Summary**: A brief statement of the driver of change and its potential importance to associations.
- **Forecasts**: Potential developments based on identifiable trends and most likely outcomes.
- **Uncertainties**: Key uncertainties around the future of the change that should be monitored.

Supporting data (page 2). This page provides key data that inform the forecast. It includes:

- **Supporting Trends**: Trends from the 300-trend inventory the research team compiled that are propelling or shaping this driver of change.
- **Notable Data Points**: Facts and statistics relevant to the driver of change.
- **Related Drivers of Change**: A list of other drivers of change related to the one at hand, useful to understand the broader context.

Strategic insights (page 3). The purpose of this page is to provide guidance on working with the driver of change in a strategic context. It includes:

- **Implications**: Broad implications for associations, intended to start discussions.
- **Timing**: The predicted stage and speed of the driver of change, which can be used to help time the trend against strategic activities and characterize the urgency of response required.
- **Potential alternative futures**: Lower-probability scenarios that should be monitored and considered for potential response.

Action steps (page 4). This page will help associations organize their initial response to this driver of change.

- **Action items.** These actions were identified by a volunteer team of association executives and business partners. If your association is already addressing this change, you may be ready to move beyond these initial ideas to other responses to take advantage of these changes.
- **Who will be affected**: Most organizations will experience each driver of change to some degree; some types of organizations and association members may experience a specific change in ways worth noting.
- **Keywords**: Key terms you might use to learn more about the driver of change. Some guidelines for using keywords:
  - Add current or recent years
  - Target specific publications, search engines, or domains such as Google Scholar or .gov or .edu.
  - Use two or more terms in combination.

CREATING A CULTURE OF FORESIGHT IN YOUR ASSOCIATION

A key aspiration of ASAE ForesightWorks is to help associations create a culture of foresight. Foresight is as much a discipline and way of thinking as it is a process and program. In fact, foresight is a leadership competency. Processes of scanning and forecasting provide the structure and opportunity to practice the thinking and decision-making skills that define leaders and shape organizations for years. Ultimately, foresight is asking good questions about the future at the right times in concert with other governance and management processes—a necessary task for effective leadership.

Foresight is also key to helping leaders manage bias. Everyone has biases and mental models that shape the way they see the world, and these assumptions can easily be incorrect. Organizations with a culture of foresight are able to collectively make sense of and exercise judgement about what the changes ahead could mean for the organization. Boards of directors and staff teams that examine strategic intelligence and analyze the implications make better-informed decisions. They are also better able to reach consensus on organizational priorities and to position their association for the coming changes. This creates buy-in and perpetuates the culture of foresight.

ASAE and the ASAE Foundation see the culture of foresight strengthening the association community in four important ways:

1. Individual association executives and volunteer leaders will become better critical thinkers and act in ways that are more visionary, bold, and accountable to the future.

2. Organizations, associations, and nonprofits will use foresight effectively in strategic planning and strategy development, anticipatory learning, risk management, and innovation and business development, creating associations that better serve their members.

3. Associations will be able to give their members the knowledge and tools to shape the future for their profession or industry before a change creates a crisis. These organizations will have a competitive and collaborative advantage in managing uncertainty and organizing collective responses.

4. The association community will work together to deepen our understanding of the future and flex our influence as a sector in creating a preferred future.

ASAE and the ASAE Foundation offer this strategic intelligence program as a model and efficient resource for establishing your association's foresight program. Although ASAE ForesightWorks can be used to track trends and issues that affect associations generally, individual associations will still need to research trends and issues of specific importance to their members. This can be accomplished by building a strategic framework and domain map for identifying patterns of change around areas of concern specific to an association's membership. Many of the overarching drivers of change identified will help associations understand future context, but additional research into areas of concern or knowledge specific to members and business questions of a particular industry will be essential to success.

There are plenty of other shortcuts that can be used to lower the time and cost of foresight research in addition to the resources developed by ASAE, including:
- Scans and future reports by other associations in the same field.

- Government studies and reports, such as White House commissions, Bureau of Labor Statistics, Institute of Medicine, national research organizations and labs.
- Foundations and their programs, such as the Pew Research Center, Lumina Foundation, Rockefeller Foundation and others that take a special interest in certain issues and needs.
- Reports from corporations and major consulting and accounting firms relevant to an association's areas of interest.
- Networking with key thought leaders and crowdsourcing through meetings and social media to identify hot topics.

Teams do the best foresight work, so consideration should be given to how to construct a team to support a systematic and ongoing foresight process and identify those who will serve as champion for understanding future changes. Member committees may be charged with scanning for key trends and issues that could affect their areas of responsibility. Strategic business partners, especially technology providers, can provide information on new developments and capabilities. Futurists and consultants who have the capacity to deepen and structure research and analysis efforts can provide an expert take on foresight research.

Foresight is an exciting and powerful way to engage members, and the possibilities to do so are almost endless. Boards can demonstrate the importance of exploring and planning for the future. Associations can organize special task forces to research high-priority changes and issue findings and guidance that benefit all members. Thought leaders and visionaries can help explore future possibilities through think tanks. Associations can engage many members to gain a sense of the possibilities and priorities through surveys, focus groups, online forums and town halls.

In the end, practicing foresight is a shared responsibility across an association, from the executive team to the board to staff to volunteers. Leading an organization into the future requires an understanding of the drivers of change that loom ahead. Members who are motivated by the desire for knowledge related to their work will want to contribute to the creation of a powerful foresight program. The practice of foresight in associations will not only advance the association sector, it will help professions and industries create their own futures.

ABOUT THE AUTHOR

MARSHA RHEA, CAE, worked as senior futurist for seven years with the Institute for Alternative Future before becoming an independent association consultant. In her association career, she held senior positions in two state and three national associations. Marsha created Signature i, LLC in 2008 after recognizing most organizations need help identifying and executing transformative visions. This business blends the strategic perspective and creative skills she gained as a futurist with her more than 20 years' experience in association management. In 2016, Marsha partnered with Foresight Alliance, a rigorous, creative, futures-focused consulting firm, to help the ASAE Foundation develop ASAE ForesightWorks.

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ASAE FOUNDATION PROVIDES future-oriented research for the benefit of ASAE members and the association management profession. The Foundation seeks to identify critical trends and effective practices by conducting cutting-edge research no single organization can undertake on its own, while delivering the highest degrees of credibility and impact. The Foundation partners with other organizations in the non-profit arena, as well as leading research and consulting firms, and top colleges and universities to provide the most significant and relevant information on the association industry.

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