

TOOL | PLANNING COMMUNITY CHANGE WITH FORECASTING AND BACKCASTING

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WHAT ARE FORECASTING AND BACKCASTING?

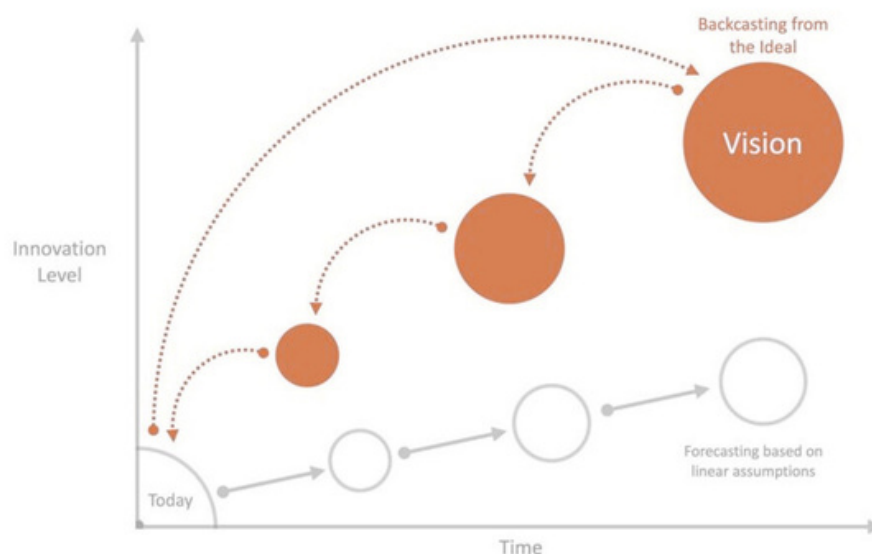
The forecasting/backcasting tool is part of the Futures family of facilitation approaches, and it presents an invaluable but relatively simple approach to bringing ideas about the future into our current thinking, planning, and strategizing in community work. Using these tools can help individuals and groups to facilitate a visioning or planning process that is grounded in evidence and lived experience, but which aims to positively disrupt our sets of expectations about our shared future and how we might develop ways of working which brings these aspirational futures into being with a degree of purpose and engagement.

Using this tool will help you to:

- Make informed design choices about engaging with multiple possible futures based on experiences and data from the past and present.
- Prepare for potential problematic futures by enabling critical scenario development.
- Play with creative ways to bring possible futures into a near-view, enabling a strategic mode of action planning.
- Augment and contribute to strategic planning processes and organizational strategic reflection.

OVERVIEW

When we engage in strategic thinking or planning, one of the key tasks is spending time in possible futures to better enable a grounded and informed process for predicting how our collaborative, coalition, or organization might prepare to operate effectively in new, emerging contexts. That is, the context within which we operate will inevitably change over time (i.e., socioeconomic, cultural and political shifts). Strategic planning efforts allow us to dedicate and leverage resources and assets in the most effective and impactful manner in the pursuit of mission, vision, and stated objectives and goals.



Forecasting is the process of speculating on potential futures based on current data, trends, lived experiences and stories. It involves projecting what is likely to happen in the future by analyzing and interacting with this past and present information. In the community sector, the goal of forecasting is to estimate future conditions or trends using statistical data, stories of lived experiences and expert judgment from community members and changemakers.

Backcasting is the process of ‘walking backwards’ from these possible futures, identifying steps which might realistically build into the desired, possible futures. It is a method of planning where you start with a specific future goal or desired outcome and work backward to identify the types of actions needed to reach that goal. Instead of predicting how things will unfold, backcasting helps identify how to make a particular future outcome happen.



HOW-TO: NEWSPAPER ARTICLES FROM THE FUTURE

FORECASTING

While there are a number of technical approaches to both forecasting and backcasting, here we'll explore an approach unique to the community sector geared toward engaging with aspirational but strategically engaging futures.

1 Define the Purpose and Scope

The first step is to clearly define why you are forecasting and what you are forecasting. The scope will guide the data you collect, and the outcomes you're looking for.

- **Purpose:** Why are you forecasting? Are you trying to predict future funding realities, changes in how you engage with clients, or possible impact of program work in communities?
- **Scope:** What specific variables or aspects are you forecasting? For example, will you forecast impact at the community level, possible policy shifts or levels of public education and engagement? Define a date range that can suit your process – perhaps 5-10 years.

2 Identify Key Variables and Assumptions

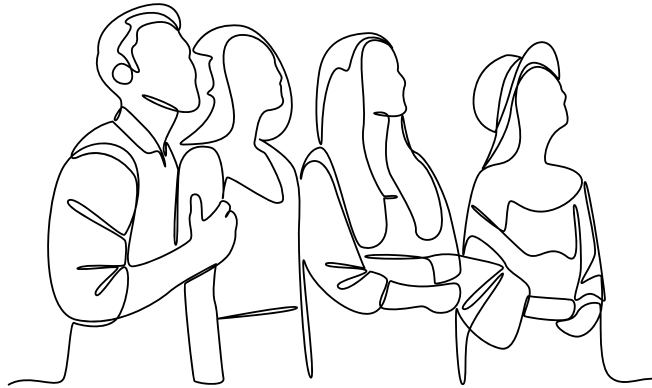
Before starting the forecasting process, identify the key variables that influence the outcome you are predicting. These could include:

- **Organizational factors** (e.g., org growth, newly recruited board, deployment of equity and anti-racism policies)
- **Client/Community factors** (e.g., community engagement patterns, seasonal trends)
- **Sectoral factors** (e.g., more competitive funding structures, changing demographics)

3 Collect and Share Stories and Data

Forecasting relies on trend data, so gather stories and lived experiences around the variables you're interested in forecasting. This could include community experiences, sectoral reports and data, or policy reflections and commentary over a certain past period.

- **Types of data:** Case studies, impact trends, community experiences, etc.
- **Interacting with data:** Share and discuss the stories and data, looking for trends and patterns that have emerged. Look for ways the data interact with each other in systemic ways i.e., during phases of limited funding, the community spends more time engaging with policymakers in strategic ways.



4 **Develop the Forecast**

Once the group has a good sense of purpose, scope and data, they can begin the facilitated forecasting.

Headlines from the Future:

- Collectively craft a headline from a future date that tells the story of strategic success within the scope of the session.
- “Local Organization Successfully Implements a Social Entrepreneurship Approach to Diversify Funding and Sustain Impact”
- Through group discussion, write a set of bullet points to summarize the impact of the headline.
- Go one level deeper, by writing a narrative story that explores the headline you’ve defined.
- Importantly, return to the data during discussion (the stories and trends) so the headline and narrative feel like it could be a legitimate extension of your current situation.

BACKCASTING

With your potential future headline finalized, now you can begin the process of defining how you might strategically engage a process for bringing it into existence. Facilitating a backcasting process involves working backward from that desired, potential future to determine the actions, steps, and strategies needed to achieve that future.

1 Analyze the Current Situation

Before you can identify the necessary steps, you should attempt to better understand the current state and challenges relative to your goal. This step involves gathering some data on where things stand right now. For example, depending on time and resources you could:

- Conduct a brief SOAR analysis or ABCD asset mapping exercise: assess strengths, weaknesses, etc. that could affect the achievement of the future goal.
- Assess current resources: understand the financial, technological, human, and other resources you currently have.
- Understand constraints: identify barriers such as political, economic, or social factors that could hinder progress.

2 Identify Critical Milestones or Phases

- Once you have a clear understanding of the desired future and the current situation, begin identifying critical milestones or phases that will be required to reach the future goal. These milestones are key points that represent significant progress toward the goal.
- Break down the long-term goal into intermediate goals: For example, if the goal is community carbon neutrality by 2040, milestones could include reducing emissions by 20% by 2025, 50% by 2030, etc.
- Determine a time frame for each milestone. This should be a realistic and achievable timeline that accounts for external factors and uncertainties.

3 Develop and Prioritize Strategies and Actions

This step involves identifying specific actions and strategies required to achieve each milestone, and discussing how to assign a priority to each action. Work backward from the desired future to figure out the necessary steps, resources, and decisions at each stage.

- **Action plans:** For each milestone, create actionable plans, detailing what needs to be done, who is responsible, the resources required and what intermediate impacts might look like.
- **Brainstorming:** Engage participants in brainstorming to explore innovative and creative solutions. This can include collaborative efforts (e.g., Collective Impact), policy changes, technological adoption, strategic partnerships, etc.
- **Risk management:** Consider potential risks and uncertainties at each stage and briefly discuss possible mitigation strategies.

4 Create a Roadmap for Implementation

Once you have the strategies and actions in place, create a clear roadmap for implementation that outlines the steps, timelines, and responsibilities for each phase leading you into the desired future reality.

- **Visual roadmap:** Use creative tools like facilitated diagramming, or more traditional graphical planning tools like Gantt charts or project management software to create a visual roadmap (this also makes it easier to track progress).
- **Communication plan:** Develop a strategy for communicating the plan and progress to communities, coalition members and other stakeholders, keeping everyone aligned and motivated.