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Together We Can

Planning for the Future of the Chapter:
Beyond the Strategic Plan

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Session Overview & Objectives

Session Description –

By using a structured process for discerning, analyzing, and acting on potential futures, you can contribute to the future of your chapter so that in 3, 6, or 10+ years your PMI chapter will continue to advance the project management community. This is an interactive, advanced session for mature chapters with boards ready to be stewards of their PMI chapter.

Session Objectives –

1. High-level **introduction** of the concept Duty of Foresight
2. Understanding what are **Drivers of Change**
3. Examine examples from a PMI **chapter viewpoint**

Agenda

Part 1: **Introduction**

Part 2: **Approach**

Part 3: **Exercise**

Part 4: **Recap**

Part 1: Introduction

- What is Foresight?
- Foresight vs Planning
- Why
- Lessons from the Past
- Drivers of Change

What is Foresight ?

"For associations to survive and thrive in a time of constant change, their leaders need to develop a clear-eyed and **disciplined focus on the future**.

The duty of **foresight** is a responsibility that boards must embrace now."

Associations Now, Jan/Feb 2016

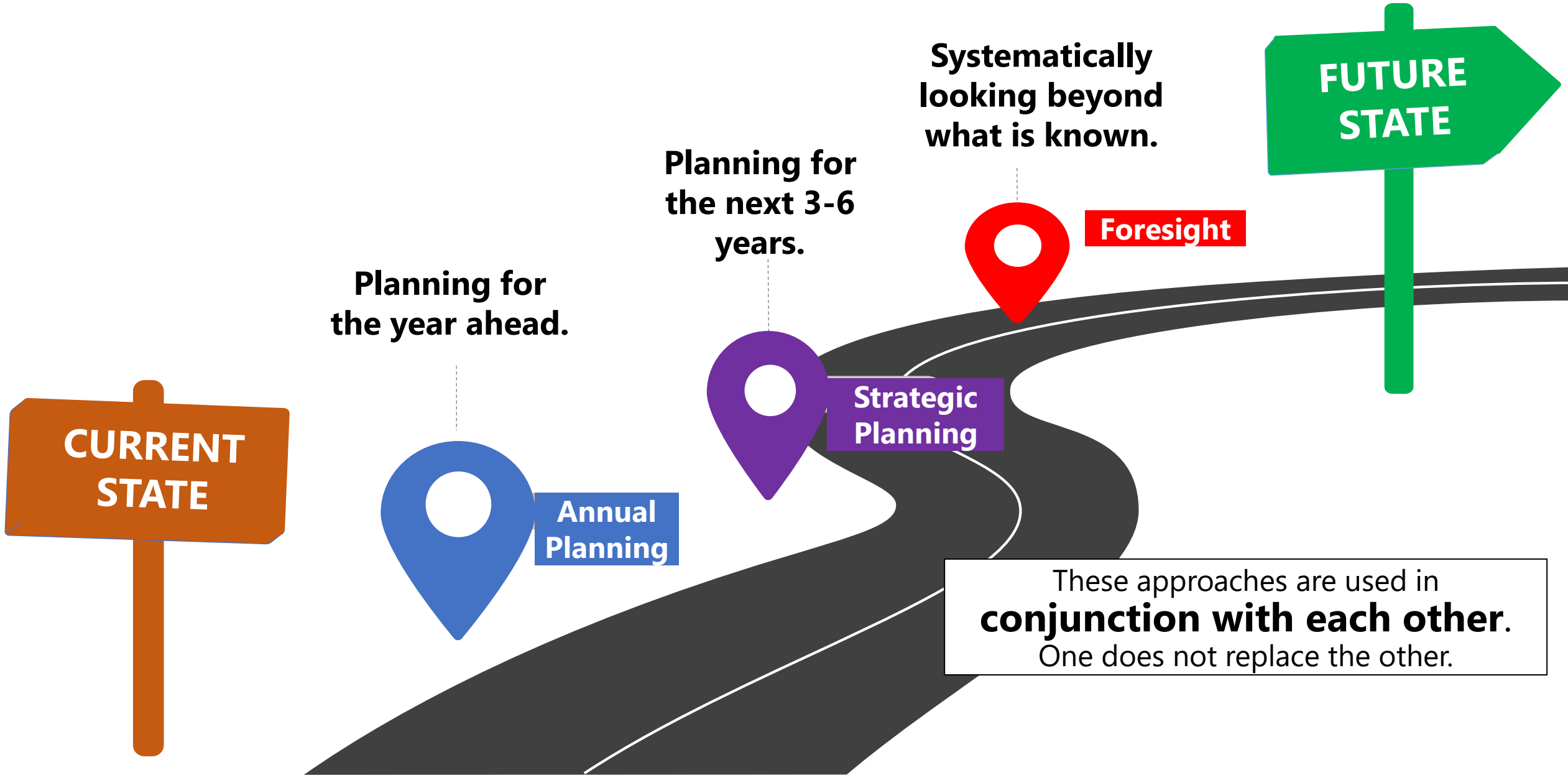
"an organized, systematic way of looking **beyond the expected**"

"considering the likely nature of **future challenges**"

"**exploring the future**, before considering the present"

"anticipate and prepare for a full range of **plausible futures**"

Annual Planning **vs** Strategic Planning **vs** Foresight



These approaches are used in
conjunction with each other.
One does not replace the other.

Why ?

Proposing the following “viewpoint" of the value to a PMI chapter

Mitigate the **“disruption/impact”** from a future driver of change, including ensuring:

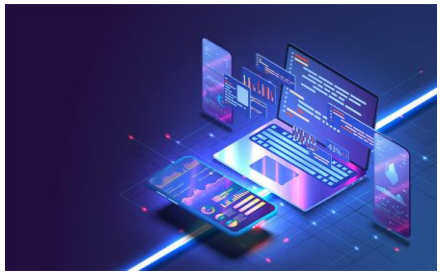
- **Operations** - sustainability of chapter operations
- **Volunteers** - engagement of volunteers
- **Members** - value to members
- **Partners** - value of relationships
- **Alignment** - alignment with PMI strategy

AND….. a tool to help capitalize on the **“opportunities”** of a future Driver of Change.

Lessons from the Past

Cross-Industry

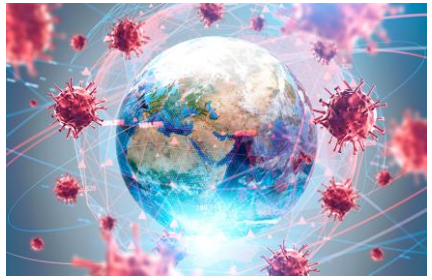
Technology



Environment

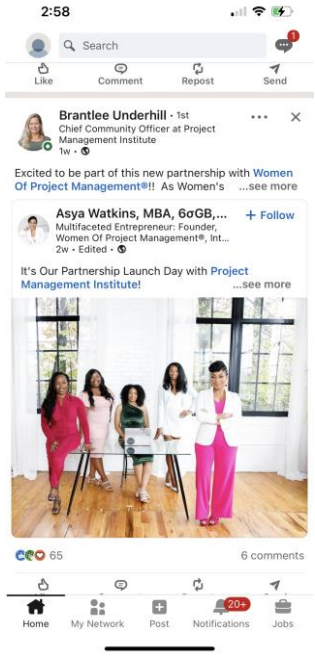
Society

Pandemic



PMI Chapter

Push vs. Passive Communication



Online vs In-Person

Drivers of Change

Drivers of Change as Defined by ASAE ForesightWorks

Content, Learning & Knowledge	Data & Technology	Demographics & Membership
Higher Education 4.0	Anticipatory Intelligence	Aging World
Mentoring 2.0	Blockchain Platforms	Empowered Women
Microlearning	Fast Data	Empowering the New Workforce
New Journal Models	Fraying Cybersecurity	Immigration-Drive Demography
Rejection of Expertise	Marketing & Advertising Transformation	The Next-Gen Professionals
A Shifting Environment for Content	Nichification: Big Data Segmentation	Socializing Reshaped
Virtualized Meetings	Personalized Artificial Intelligence	Volunteering
	Taming Big Tech Dependency	
	Who Owns Data?	

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Drivers of Change

Drivers of Change as Defined by ASAE ForesightWorks

Economic Conditions	Society & Politics	Workforce & Workplace
Cartel Capitalism	Algorithmic Politics	Automated Work
Climate Change Resiliency	American Inequality	Bifurcated Workforce
Global Power Shifts	Declining Trust	Diversity & Inclusion
Philanthropy Reshaped	Ethical Consumption	Human-Machine Cooperation
The Productivity Paradox	Ethical Edge Innovation	More Human Humans
The Sharing Economy	Healthcare Disruption	New Forms of Work
Trade in Transition	Population Healthcare	Reputation by the Numbers
	Shifting Terrain for Advocacy	Re-Working Career Pathways
	Splintered Society	Toward a Spectrum of Abilities
	Standards Under Pressure	
	Transparent Organizational Ethics	

Leverage the Drivers of Change

Drivers of Change are "**relatable**", and provide an easily understood **platform to engage** and strengthen the adoption of the Duty of Foresight concept in your chapter

- Inspire a new vision
- Jumpstart strategic conversations with the board
- Identify the issues that matter to members
- Engage your members
- Stress test your business model and business practices
- Plan for technology investments
- Scan for innovative opportunities
- Start a conversation with peers

Part 2: Approach

- Foresight Process
- Chapter Example
- Getting Started

Process of Foresight Planning

Framing	Scanning	Forecasting	Visioning	Planning	Acting
Scoping the project	Collecting information	Describing baseline and alternative futures	Choosing a preferred future	Organizing to achieve the vision	Implementing the plan

Adapted from *Thinking About the Future* by Andy Hines and Peter Bishop (2015: Hinesight).

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Chapter Example

Framing

Pick an "easily aligned" starting point, perhaps start with either:

- **Driver of Change** – scope based on **how the driver relates** to your operations, programs & stakeholders

OR

- **Key operations/program** – scope based on **how this individual chapter item** relates to a Driver of Change

Scoping the project: Attitude, audience, work environment, rationales and purpose, objectives and teams = focal issue

Chapter Example

Analyze the scope you picked:

- **Simplify/Structure** the Driver of Change to optimize alignment to your chapter's situation
- **Identify the Impact** across your operations, processes and stakeholders

Scanning

Collecting Information: They system, history and context of the issue and how to scan for information regarding the future of the issue = information

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Chapter Example

Forecasting

Identify the future scenarios

- List the **top future scenarios/outcomes** based on the impact

Describing baseline and alternative futures: Drivers and uncertainties, tools, diverging and converging approaches and alternatives = baseline & alternative futures

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Chapter Example

Visioning

Align on your preferred outcome

- **Define** your future-state scenario

Choosing a preferred future: Implications of the forecast, and envisioning designed outcomes = Preferred future

Chapter Example

Planning

How you will reach your future state

- Conduct an analysis of your **current vs future state** that will identify what/how your chapter needs to change to reach your preferred future state

Organizing to achieve the vision: Strategy, options and plans

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Chapter Example

Acting

Execute the plan

- Assign a lead volunteer (or committee)
- Run it like a real project
- Measure & report
- Be agile (assess & realign constantly)

Implementing the plan: Communicating the results, developing action agendas and institutionalizing strategic thinking and intelligence systems = Actions

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Getting Started

Step 1:	**Prepare**	Assign a lead, educate & plan
Step 2:	**Identify**	Assess Chapter's "Drivers of Change"
Step 3:	**Align**	Start with a high-priority driver

Getting Started – Tips

- Chapters can choose to **just do part of the process** to at least discover what members view as the strengths, weaknesses, and future challenges of the chapter.

- Commit to making a foresight discussion **part of the board agenda** to keep it top of mind for review and changes if needed.

- Constant championing, reinvestment and development are necessary. The board is engaged and developed, and the board culture is **shaped toward a futures mindset.**

Part 3: Exercise

Let's Practice

Each table will be assigned **one** Driver of Change for your group exercise.

Activity Steps:

1. Review & discuss your Driver of Change (understand & align)
2. Discuss questions 1- 4
3. Assign a person from your table who can be ready to share any notable conclusions, struggles or takeaways at the end of the exercise when we do a recap.

Discussion Questions

Question 1:

How will this change affect our *chapter* ?

a. Processes – are chapter operations impacted ?
b. Volunteering – will chapter volunteering change ?
c. Policies – will chapter policies need to change ?
d. Other ?

Question 2:

How will this change affect our *members* ?

a. Their relationship with the chapter ?
b. Volunteerism and engagement ?
c. Their job or business opportunities ?
d. What will they need to know and learn ?
e. Other ?

Question 3:

What are the opportunities & challenges ?

a. What are the opportunities ?
b. What are the challenges or risks ?

Question 4:

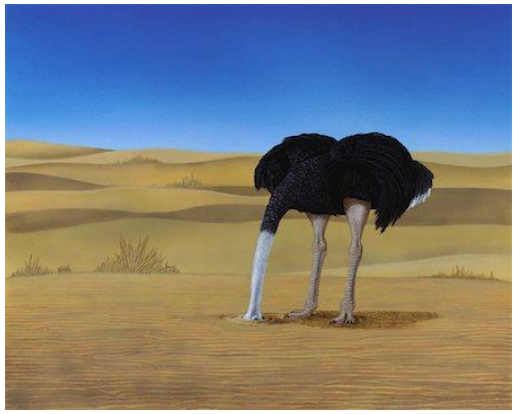
What immediate responses & actions would you recommend our association take?

a. List near-term actions

Drivers of Change* - Rejection of Expertise

*Driver of Change: A confluence of trends or a forecast likely to result in significant change in a system. (ASAE Foresight Works User's Guide)

Rejection of Expertise



Rejection of expertise

Public **skepticism toward credentialed experts** and institutions is growing. Expert pronouncements have reduced impact on public perception, with the public turning instead to non-credentialed and "unofficial" sources for guidance and information. At the same time, information is increasingly able to route around gatekeepers.
In response, new frameworks and institutions for curbing the spread of misinformation are being developed.

Drivers of Change* - Transparent Organizational Ethics

*Driver of Change: A confluence of trends or a forecast likely to result in significant change in a system. (ASAE Foresight Works User's Guide)

Transparent Organizational Ethics

Transparent organizational ethics

Organizations will face new kinds of scrutiny as drivers of transparency proliferate. Ubiquitous connectivity and information-capture, new sensing capabilities, and pervasive social media all enable **hyper-transparency of organizations' actions**, necessitating actively managing reputation in a world increasingly motivated by demands for ethical organizational behavior.

Drivers of Change* - New Generation Professionals

*Driver of Change: A confluence of trends or a forecast likely to result in significant change in a system. (ASAE Foresight Works User's Guide)

New Generation Professionals

Next generation professionals

Millennials are now the largest generational cohort in the workforce, and generation Z is right behind them. These next-gen professionals are the future of associations and, as gen Z begins to moves into adulthood, the two **generations are showing significant differences in their outlooks and priorities**. Organizations will need to provide the kinds of training, mentoring, content, and other services that each of these upcoming generations value most, encouraging engagement that leads to loyalty.

Drivers of Change* - Volunteering

*Driver of Change: A confluence of trends or a forecast likely to result in significant change in a system. (ASAE Foresight Works User's Guide)

Volunteering

Volunteering

Cultural, demographic, and technological changes are **altering volunteer expectations and experiences** in an increasingly dynamic and digital organizational environment. Associations and nonprofits are experimenting with more flexible roles and structures to support collaboration and contribution.

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Part 4: Recap

- Exercise Recap
- Additional Resources
- Session Summary
- Q&A

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Recap Exercise

Conclusions (responses to questions)
Struggles (why was it hard)
Insights (what did it reveal about your chapter)
Takeaways (what are you taking back)

Resources

ASAE's Foresight Research Hub

https://www.asaecenter.org/resources/asae-foresightworks

Future-focused Publications

https://www.asaecenter.org/asae-home/resources/articles/an_plus/2016/february/a-foresight-toolkit-for-association-boards

Four Ways to Apply Foresight in Association Work

https://www.asaecenter.org/asae-home/resources/articles/foundation/2022/four-ways-to-apply-foresight-in-association-work

UN Department of Economic and Social Affairs Briefing on Foresight

https://unpan.un.org/sites/unpan.un.org/files/Strategy%20note%20%20strategic%20foresight%20Mar%2021_1.pdf

Session Summary

- ✓ **Introduced** the concepts
- ✓ **Explained** Drivers of Change
- ✓ **Related** use for a PMI Chapter

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Q & A

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Advanced Level Workshop: Planning the Future of the Chapter: Beyond Strategic Planning

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URL: https://tinyurl.com/bdez4w6w

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