
AGING SERVICES

2030 Scenarios

GUIDE

LeadingAge®



The Institute for Alternative Futures developed the 2030 Aging Services Scenarios in partnership with LeadingAge to explore the future need for and delivery of aging services in the context of expectable, challenging and visionary futures. These scenarios consider how changes in demographics, economics, technology and cultural values will influence the supply and demand for products and services sought by an aging society, and what implications these changes may have for the visions and plans of today's leaders in aging services.

This guide accompanies the 2030 Aging Services Scenarios Toolkit, which includes a paper detailing the scenarios, video, PowerPoint presentation and other resources, available via www.LeadinAge.org/2030Scenarios. This is intended to aid provider member organizations in conducting their own scenario workshop and considering the implications the scenarios may have on their own strategies and plans.

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Introduction

Created for LeadingAge members, this guide for using the 2030 Aging Services Scenarios will help enrich strategic plans with the Aspirational Futures Method developed by the Institute for Alternative Futures (IAF). These scenarios offer leaders an opportunity to integrate their visions and strategic plans with forecasts and scenarios. Doing so assures that an organization or endeavor considers what will possibly or likely change as well as their preferred future or vision.

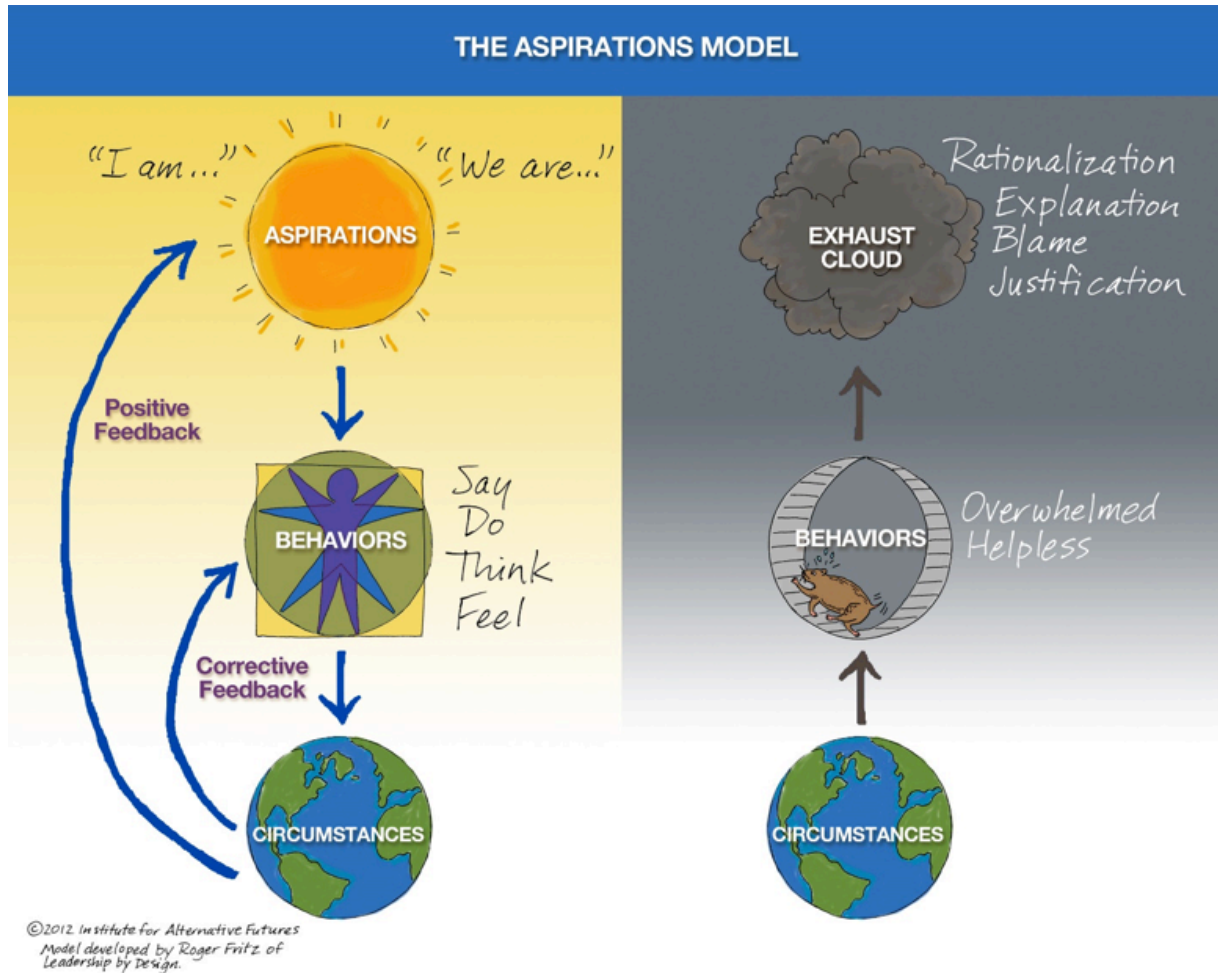
Without this longer-term view of both likely and preferable futures, strategic plans tend to become more operationally focused. This allows implicit assumptions to become biased by the past and the present circumstances surrounding the organization. These assumptions create a cultural tendency to suppress information that indicates change is coming rather than to invite thinking about new contingencies and options. These assumed circumstances underlying plans can make it harder for leaders to see information indicating they are missing something vital. Without this information plans are not “future tested” and can become brittle when new circumstances arise.

Changes in the big picture—demographic shifts, economic transitions, new technologies and social value changes—may appear peripheral for operationally-focused strategic plans. Without forecasts and scenarios, an organization will more likely miss significant new opportunities or be slower to respond when new challenges arise. In effect, without attention to futures, an organization will not be agile when unanticipated change comes more quickly. Long-term strategies that account for big-picture changes shift attention from operational level concerns to unconventional assumptions about the larger environment. These new assumptions prompt creative solutions to problems that may not have become fully clear yet. Solutions found earlier often have higher degrees of freedom than when current approaches become problematic. Thus, for aging services providers, the futures discussions shaped with this guide will assure that your bigger and longer-term interests can be considered early and actions planned accordingly.

This guide shows how the 2030 Aging Services Scenarios can be used prior to or alongside an existing strategic plan and vision so that aging services providers prepare to thrive in a changing environment. The guide includes explanations for relating vision, alternative futures and strategy along with process templates such as agendas, exercises and worksheets. These materials can be used for boards and staffs of LeadingAge provider member organizations to help lead in changing times.

VISION AND ASPIRATIONAL FUTURES

The guide recognizes vision is important for leaders to inspire, guide and align people in an endeavor or organization. This guide assumes that the vision of LeadingAge members already exists and therefore, in this section we describe how the scenarios, forecasts, and strategic tools relate to vision. Figure 1 below helps orient this discussion of vision, strategic plans and futures.



When Roger Fritz devised this model, he recognized that our aspirations are distinct from ambitions insofar as they reflect who we are (individually or collectively) when we are at our best—when we are most who we want to be. Our visions, when authentic, are statements reflecting this idealized identity that help orient us to who we strive to be in the world. If the vision is not authentic and people cannot recognize themselves in it, then it lacks the power to inspire, motivate and guide action. However, when we are clear on this aspiration and can identify with it, then we look to all the behaviors in the next circle that support and align with our vision.

The first alignment of behavior is in what we say and do. It is a matter of personal and collective integrity that these “outer world” behaviors align along with the more internal behaviors of how we think and feel about what we do and say. When they fall out of alignment, and people don't

“walk their talk” then their integrity gets questioned. There is also internal stress when we make a decision that does not feel right because the values inherent in our aspirations do not align with what is decided. This is where the “inner world” behaviors of thinking and feeling shape our judgment. In an organizational culture the tensions often show up when internal behaviors expressed as policies, strategies and budgets conflict with the values expressed as vision. This creates an integrity and alignment challenge. This type of challenge becomes more likely when the behaviors organized for action (e.g., resource allocation) are conceived without reference to aspirations. This can also occur because the circumstances change, as described by the discussion of the right side of the diagram below.

First, however, it is important to note how the behaviors that are organized into a strategic plan are anticipated to change the circumstances, such as by meeting goals. When this occurs, an organization receives positive feedback that should be celebrated. This is particularly important because it affirms the aspirations and the behavior. Yet feedback can also be corrective, indicating the plan needs adjusting. This generally occurs because the circumstances are not fully understood and other forces may be creating unanticipated change. One of the ways in which alternative scenarios enrich strategic plans is their ability to widen the view of how different forces can change the circumstances. Circumstances are co-created by a complex set of actors and forces which can never be fully predicted, but can be projected as forecasts to stimulate thinking about how change opens new opportunities and challenges.

Yet, there also are times for people and most organizations when those changes in circumstances become overwhelming, as illustrated on the right side of Figure 1. This condition of feeling overwhelmed or helpless represents a vital leadership challenge. An overwhelmed psyche or organizational culture can become a victim of circumstances and this changes the behaviors so they work against aspirations. When this occurs repeatedly a form of victimization results which psychologists call learned helplessness. This shows up like a cloud of exhaust that is filled with rationalizations, justifications and explanations—none of which focus on the behaviors aligned with aspirations. Leaders need to recognize when this occurs—in themselves as well as their organizations. Then they need to acknowledge what is overwhelming, speak to authentic aspirations and focus attention on the behaviors that align with those aspirations.

In IAF sets of scenarios using Aspirational Futures, there are 2 scenarios that are conceived as circumstances created by leaders

in organizations that achieve surprising successes. A critical mass of these leaders and organizations effectively pursuing their visions are key to changing the circumstances in ways not seen before. Our history shows this has happened before so our futures should describe how it could happen again. These are vital scenarios for orienting strategy toward outstanding rather than ordinary results. In human history, there are always times when leaders and societies surprise the world. The leaders themselves and those who help achieve the results may be the only ones who are not surprised. People who are highly successful have the end in mind when they begin to create change. The aspirational scenarios should help stimulate thinking for today’s leaders about what those ends might look like.

ALTERNATIVE SCENARIOS

Because complex environments inherently produce uncertainty, emergence and surprise, singular predictions will always prove inadequate. Using alternative scenarios means that inherent uncertainty is both acknowledged and used to enable two forms of judgment when making decisions in the face of multiple possible outcomes. One form is more objective and relies on assessment of probabilities. The objective judgment that one scenario appears more likely than the others can be made by the group and reviewed periodically to see if intervening events or new information changes the assessment of probabilities. The subjective form of judgment is also important for investing in change, and that shapes our preference for scenarios that align with our aspirations. These scenarios may be less likely when viewed objectively, but more inspiring. They describe how visions are achieved even though those future states are far less likely than expectable or more challenging scenarios. Below, the instructions include polling participants on the likelihood and preferability of the scenarios. The results of this polling also raise questions about whether strategies aim to reinforce the “most likely” scenario or create a “preferred” scenario.

After using these scenarios, clarifying their visions and strategic plans and making major investments, many organizations subsequently do environmental scanning to check how developments anticipated in the scenarios relate to what is actually emerging, often years after the scenarios were used. When intervening events or new knowledge changes a strategic assumption, the environmental scan invites a review of plans and goals that were created to identify opportunities for accelerating success or needs for contingency plans.

The 2030 Aging Services Scenarios published by LeadingAge present the alternative possibilities along with an introduction explaining further how they were constructed. This guide provides instruments that can be used with the scenarios by boards and staffs who want to enrich their strategic planning processes. The guide includes:

- A polling form for assessing both the likelihood and preferability of the scenarios.
- Sample agendas for half day and full day meetings using the 2030 Aging Services Scenarios.
- Templates with questions for teams to answer when using the scenarios to create and test strategies.

Agendas

Varying workshop lengths allow for different experiences — ranging from a high-level analysis to a deep dive into scenario work — and should consider the expectations and availability of participants. Productive and meaningful outcomes can arise from workshops ranging from 90 minutes to a full day. Below are agendas and instructions options for workshops: Full Day, Half Day and Board Meeting.

FULL DAY AGENDA

SUPPLIES NEEDED: PowerPoint projector, Flip chart, markers, lunch and refreshments. For each participant: Small Group Response Template, Scenarios, Idea Timeline Worksheet, Likelihood and Preferability poll. Eight copies of the Small Group Instructions.

Scenario Team Assignment: Participants will be part of a team that explores one of the 4 scenarios. You can assign them to a team before the meeting and let them know their assignment and encourage them to read the scenarios in advance, particularly their assigned scenario. Alternatively, you can have them sit randomly at tables when they arrive, with the scenarios assigned to the table.

Vision: The hosting organization should provide a written version of their vision and goals for each participant. This will serve as a reference when considering strategies and implications.

9:00 Welcome and Introduction

- Review workshop agenda and objectives for your organization.
- Have participants introduce themselves.

9:20 Present the 4 2030 Aging Services Scenarios

- Review each of the 4 scenarios (10 to 12 minutes per scenario).
 - For each scenario, have someone present the scenario and then have participants review the text and matrix for that scenario.
 - Briefly discuss the scenario and take questions (5 min).
- Have each participant complete the Likelihood & Preferability Poll (5 min).
 - Collect and process the results while the group continues with the agenda. Calculate the average rating for each scenario for both likelihood and preferability, and share the results later with the full group assembled.

10:20 Break

10:35 Small Group Instructions

- Review the Instructions for Small Groups provided in this guide (page 14).
- Recruit a group facilitator and reporter for each group. This can be done in advance, or volunteers can step forward at this time.
- If the scenario assignments have not been made in advance, assign one scenario to each group. These scenario teams will then explore their scenario in detail and consider the implications for the organization or community.

10:45 Small Group Discussion

- Each group steps into and considers its assigned scenario.
- Each group completes the Small Group Response Template for its assigned scenario.

12:15 Lunch

- This can be a working lunch, where each small group collects lunch and the Scenario Teams make their presentations, or it can be a specified lunch break of 30 to 60 minutes.

1:15 Full Group Discussion of Implications and Idea Pitches

- Each small group has 10 minutes to present its report on implications of their scenario and their best ideas for strategy of their scenario and answer questions about their scenario or ideas.

2:00 Small Group Discussion by Scenario Teams: Rank and List Their Ideas

- Each team uses the feedback from the full group to determine and define their best strategic idea.

2:10 Idea Teams

- With the top ideas identified, participants choose one of the top ideas to work on. They will gather with others who chose that idea and develop a long-term goal (10 to 30 years out) for that idea, as well as milestones on way to achieving the goals. A form for placing these milestones on a timeline is provided in this guide.

3:00 Idea Pitches

- Each idea team makes a 3-minute pitch for their idea becoming a strategy for their organization or endeavor.

3:15 Likelihood and Preferability Results

- After collecting the polling forms, enter the results into the Likelihood and Preferability Spreadsheet (found at www.LeadingAge.org/2030Scenarios) provided to generate the average likelihood and preferability scores for each scenario. (Where there are a small number of participants taking the poll, some groups prefer to report the median rather than the average/mean. The spreadsheet generates both.)
- Facilitator presents and interprets the results from the Likelihood & Preferability Poll.
 - 100% for likelihood means absolute likelihood, 0% means not a chance; 100% for preferability means that it is totally preferable; 0% means there is nothing preferable.

- Expect likelihood ratings to be higher for Scenario 1. Scenario 2 offers a challenging future and Scenarios 3 and 4 offer visionary alternatives. Expect preferability ratings to be higher for Scenarios 3 and 4, which were developed and written to represent the most preferable among the 4.
- Planning for the most likely future tends to reinforce a suboptimal outcome. The discussion of robust strategies generally gives a better sense of strategies that would build visionary futures.

3:30 Robust Strategies & Next Steps

- The full group identifies and discusses the similarities or differences in the small group answers across the scenarios. Then the full group considers the following:
 - What strategies are robust, i.e., which would work in 2 or more scenarios?
 - If one of the other futures comes about, what would you be ready to do?
 - Should you—through your strategies, programs, or other actions—help create the preferable scenarios or make them more likely? What would that take? And how does this relate to the organization’s current vision: would any adjustments be needed?

4:00 Adjourn

HALF DAY AGENDA

SUPPLIES NEEDED: PowerPoint projector. For each participant: Small Group Response Template, Scenarios, Likelihood and Preferability poll. Eight copies of the Small Group Instructions.

Scenario Team Assignment: Participants will be part of a team that explores one of the 4 scenarios. You can assign them to a team before the meeting and let them know their assignment and encourage them to read the scenarios in advance, particularly their assigned scenario. Alternatively, you can have them sit randomly at tables when they arrive, with the scenarios assigned to the table.

Vision: The hosting organization should provide a written version of their vision and goals for each participant. This will serve as a reference when considering strategies and implications.

9:00 Welcome and Introduction

- Review workshop agenda and objectives for your organization.
- Have participants introduce themselves.

9:20 Present the 4 2030 Aging Services Scenarios

- Review each of the 4 scenarios (10 to 12 minutes per scenario).
 - For each scenario, have someone present the scenario and then have participants review the text and matrix for that scenario.
 - Briefly discuss the scenario and take questions (5 min).

- Have each participant complete the Likelihood & Preferability Poll (5 min).
 - Collect and process the results while the group continues with the agenda. Calculate the average rating for each scenario for both likelihood and preferability, and share the results later with the full group assembled.

10:00 Small Group Instructions

- Review the Instructions for Small Groups provided in this guide (page 14).
- Recruit a group facilitator and reporter for each group. This can be done ahead of the workshop.
- Assign each group one of the scenarios to explore a scenario in detail and consider the implications for your organization or community. This can be done ahead of the workshop.

10:05 Small Group Discussion

- Each group steps into and considers its assigned scenario.
- Each group completes the Small Group Response Template for its assigned scenario.

11:05 Full Group Discussion

- Each small group presents a summary from its discussion on implications of their scenario (5 minutes per group).
- The full group identifies and discusses the similarities or differences in the small group answers across the scenarios.

11: 35 Likelihood and Preferability Poll Results

- After collecting the polling forms, enter the results into the Likelihood and Preferability Spreadsheet (found at www.LeadingAge.org/2030Scenarios) provided to generate the average likelihood and preferability scores for each scenario. (Where there are a small number of participants taking the poll, some groups prefer to report the median rather than the average/mean. The spreadsheet generates both.)
- Present and discuss the results from the Likelihood & Preferability Poll.
- Facilitator presents and interprets the results from the Likelihood & Preferability Poll.
 - 100% for likelihood means absolute likelihood, 0% means not a chance; 100% for preferability means that it is totally preferable; 0% means there is nothing preferable.
 - Expect likelihood ratings to be higher for Scenario 1. Scenario 2 offers a challenging future and Scenarios 3 and 4 offer visionary alternatives. Expect preferability ratings to be higher for Scenarios 3 and 4, which were developed and written to represent the most preferable among the 4.
 - Planning for the most likely future tends to reinforce a suboptimal outcome. The discussion of robust strategies gives a better sense of strategies that would yield results that are more positive.

11:45 Next Steps

- What strategies are robust, i.e., which would work in 2 or more scenarios?
 - Are there any current strategies that would be counterproductive in one or more of the scenarios?
- Given the discussion on strategic implications, contingency thinking, vision, and likelihood/preferability, what next steps should the organization take to:

- Change or add current strategies and actions?
- How do these new or evolved strategies relate to the current vision?
- Remain aware of the major forces shaping public health and your work, including using these scenarios?

12:00 Adjourn

BOARD MEETING AGENDA (90 MINUTES)

SUPPLIES NEEDED: PowerPoint projector. For each participant: Likelihood and Preferability poll, Scenarios.

- Convener introduces the session.
 - Explain why now is the moment for scenario planning, and the benefits this offers to your work (5 – 10 minutes).
- Briefly Outline the process used to identify the scenarios and then describe the 4 Scenarios (20 minutes).
- Likelihood and Preferability Poll (5 minutes).
 - Have participants complete the form, and then calculate the averages to share at the end of the session. Calculate the results on the Likelihood and Preferability Spreadsheet (found at www.LeadingAge.org/2030Scenarios).
- Three participants offer illustrative examples of what these scenarios may mean for their organizations and related decision-making and planning, and consider:
 - What are the top 2 challenges and top 2 opportunities seen as a result of these scenarios?
 - *The 3 participants presenting will need to be provided the scenarios in advance.*
 - (15 minutes total; 5 minutes each).
- Table dialogue
 - Attendees discuss how one or 2 of these scenarios might impact them (15 minutes).
- Full Room Conversation
 - Facilitate a group discussion about ideas/impacts/insights that arise from table dialogue and offer their own reflections/reactions based on their experience as futurists.
 - Then, present the results of the Likelihood and Preferability Poll and discuss how likely, challenging and preferred scenarios inform strategic plans and decisions.
- Conclusion
 - Explain and offer resources and guide.
 - Closing remarks.

Likelihood and Preferability Poll

Each participant should judge the 4 scenarios' likelihood and preferability with a value from 0 to 100; 0 represented not likely or not preferable at all, and 100 represented complete likelihood or preferability. The scenarios are not to be considered as mutually exclusive sets, so the sum of values in each column can exceed 100.

Use the table below:

	LIKELIHOOD	PREFERABILITY
Scenario 1 Bills Come Due — Aging and Unprepared	0 to 100	0 to 100
Scenario 2 Troubled Times — Economic and Social Regression	0 to 100	0 to 100
Scenario 3 A Bright Horizon — Mindful and Connected Aging	0 to 100	0 to 100
Scenario 4 A Thriving System — Technology Abounds	0 to 100	0 to 100

To calculate the average, add the scores (for each square) and divide by the number of participants. This will provide a value to evaluate the perception of participants. Included as part of the 2030 Scenario Planning Toolkit found at www.LeadingAge.org/2030Scenarios, you will find an Excel Spreadsheet to generate the average likelihood and preferability scores for each scenario. (Where there are a small number of participants taking the poll, some groups prefer to report the median rather than the average/mean. The spreadsheet generates both.)

When interpreting the results from the Likelihood & Preferability Poll, consider: 100% for likelihood means absolute likelihood, 0% means not a chance; 100% for preferability means that it is totally preferable; 0% means there is nothing preferable. Expect likelihood ratings to be higher for Scenario 1. Scenario 2 offers a challenging future and Scenarios 3 and 4 offer visionary alternatives. Expect preferability ratings to be higher for Scenarios 3 and 4, which were developed and written to represent the most preferable among the 4.

Planning for the most likely future tends to reinforce a suboptimal outcome. The discussion of robust strategies gives a better sense of strategies that would yield more positive results.

Instructions for Small Groups

Small groups will require a facilitator to lead the discussion, and a recorder to take notes.

Facilitation & Recording/Reporting Tips:

- Get everyone to participate, discuss.
- Recognize that one person's implication or recommendation may stimulate other people to think of additional implications or recommendations.
- Remember that as facilitator and reporter you are members of the group and you should feel comfortable adding your thoughts to the discussion.
- The reporter should capture the key points of the discussion—core phrases or sentences.
 - As they are capturing the answers to the questions, the reporter should be thinking about the highlights of the answers, for when you present the summary of the small group's report to the full group.
- Facilitator reviews the objectives and timing for the session and have participants introduce themselves and their organization (5 minutes).
- Ask if small group members have any questions.

Reviewing Questions 1 – 3 on biggest changes

- Ask participants what they've identified (more can be added during the discussion).
- Reporter records these on the laptop—the highlights, key phrases.

Reviewing Questions 4 – 6 on strategic implications

- Facilitator asks for responses—Have a participant identify one strategic implication. The reporter lists this on the laptop.
- The facilitator asks the first person for implication—then asks if others had the same or similar implications.
 - Reporter records these.
- The facilitator asks for someone with a different implication—facilitator asks if others had this implication or something similar.
- Repeat this until you've gotten all the implications for goals and strategies recorded for each question
 - Reporter records highlights, key phrases.
- Group discussion ends.
- Reporter prepares for brief presentation on responses to 4 – 6.

Small Group Response

Considering biggest changes in your scenario:

1. In your scenario, which new technologies, applied in the 2020s, do you expect to have the biggest impact on the population you serve? (Ex: low-cost energy production and storage, community and home food growing, smart home technology and monitoring systems and 3D printing.)

2. In your scenario, which changes in the aging services workforce will matter most to the population that you serve?

3. In your scenario, which changes in policy will most impact the populations that you serve?

Considering strategic implications for your organization in the context of your scenario:

4. What will make your organization most successful in the scenario through the 2020s?

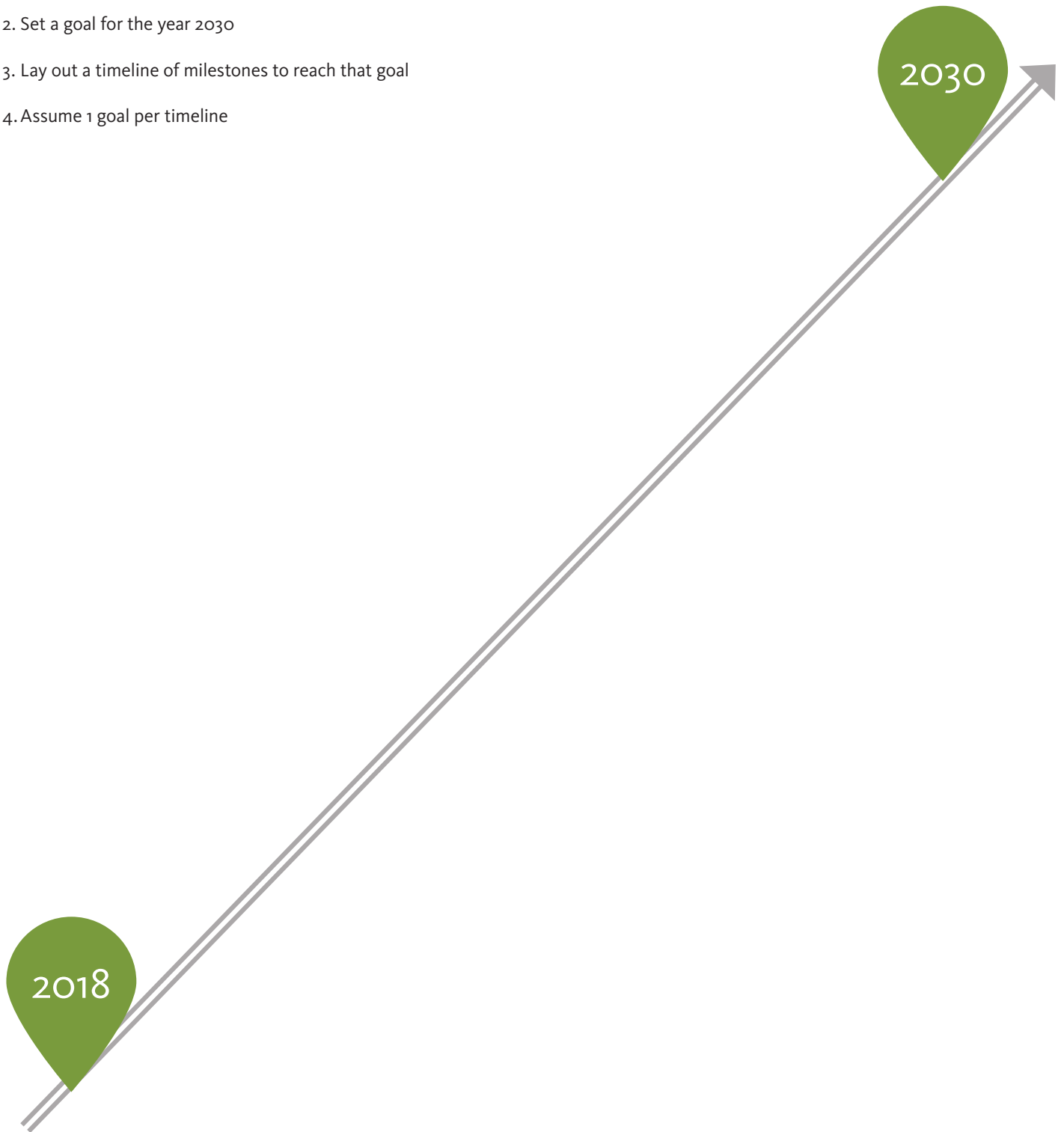
5. What innovative new ideas and strategies that your organization is not yet implementing would be successful?

6. What existing strategies will continue to be successful?

Idea Timeline Worksheet

Priority idea title:

1. Label the idea (above)
2. Set a goal for the year 2030
3. Lay out a timeline of milestones to reach that goal
4. Assume 1 goal per timeline



Notes

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