

A Glossary of Core Terms for Strategic Foresight And Three Levels of Competence in Foresight Work

BACKGROUND

In mid-June 2011, the Alberta foresight community gathered in both Calgary and Edmonton. The meetings included a discussion of (a) key terms used in the practice of strategic foresight and (b) the patterns of thinking about the future that characterize lay persons, novice professionals and experienced professionals. The results, as understood by Ruben Nelson, are set out below. Version 2.0 was revised August 26, 2015.

Feel free to test the adequacy of this glossary with others known to you who care about the practice of strategic foresight. Your comments and suggestions for revisions or additional terms will be welcomed. Contact Ruben at rubennelson@shaw.ca

KEY TERMS

- **Foresight:** Acting wisely in the present, with conscious intent to shape a deeply desirable future. This intention requires us to learn to act in light of explicit and adequate anticipations of the full range of ways one's future context and its implications may develop. Such anticipations must be tested reflexively and even meta-reflexively.
- **Strategic:** Having to do with establishing, reinforcing or changing the fundamental trajectory of a person or group into and through the future.
- **Strategic Foresight:** Acting with foresight (see above), paying particular attention to *trajectory-altering* events, forces, threats, opportunities and commitments. Strategic foresight informs and provides a context for management/policy, just as management/policy provides a context for operations/administration. Strategic foresight is the applied art/science of the pure art/science of futures research (also called futures studies). Strategic foresight is focussed on one's context. Its purpose is to ensure the continuing relevance of the person/organization in question.

The formal definition used by Foresight Canada: *Strategic Foresight 2.0 is the personal, group and societal capacities and culture that enable us to see and shape a deeply desirable future by making and living by wise strategic commitments in the present – commitments that are sound and context-sensitive enough to survive context change and actually contribute to the co-creation of a future we desire..*

- **Futures Research/Studies:** To explore systematically and methodically the drivers, dynamics, and depths of why and how things have changed, are changing and may well change in the future. Such an understanding is the basis for exploring the full range of futures – potential, professed, programmed and picked/desired – that may emerge from the present. Futures research can be seen as a “pure” art/science that is undertaken to increase understanding of the emergence of one’s future self and world from one’s past and present.
- **Reflexive:** Being self-critically self-aware.
- **Meta-reflexive:** Being reflexive about one’s reflexivity.
- **Planning:** The intentional projection into the future of one or more desired states of affairs – goals or objectives stated as outcomes and outputs – along with the staged actions that are required to achieve the desired ends. Note: strategic foresight is logically upstream from planning. It informs planning, but is not merely an extension of planning. Rather, strategic foresight is as different from planning as planning is from operating.
- **Speculate:** In conditions of uncertainty and ignorance, to state one’s view of the range of characteristics that a particular sector or topic may have at a specified time in the future.
- **Predict:** To state one’s best present judgment regarding what one sees as the characteristic features of a particular sector or topic at a specified time in the future. Past trends may or may not be taken into account.
- **Project/Extrapolate:** To determine the future trajectory of one or more particular trends over a given time, based on one’s assessment and understanding of its past trajectory and dynamics.
- **Forecast:** Under conditions of uncertainty, to make a probabilistic prediction – one that allows for a somewhat greater range of possible outcomes than is the case with a prediction. Forecasts are more tentative than predictions.
- **Outlook:** Under conditions of substantial uncertainty, to offer a somewhat general and probabilistic view of the most likely range of characteristic features that a

particular sector or topic may have at a specified time in the future. Outlooks are even more tentative than forecasts.

- **Anticipate:** To look forward in one’s imagination to a particular event or outcome at a given time, in a given setting. One may anticipate with a mixture of hope and dread.
- **Envision:** To imagine a future state of affairs that may, or may not, be achievable.
- **Visioning:** To imagine a future state of affairs that, in principle, is achievable, even if it is unimaginable to most people..
- **Strategy:** An approach (course of action) that is intended to lead to the achievement of a stated end.
- **Strategize:** To determine the range of possible ways a given desirable outcome may be approached and achieved in the future.
- **Strategic Planning:** A planning activity, invented in the 1960s, that is logically upstream from operational planning. Typically it determines the vision, mission (strategic intent), goals and core management strategies of a given organization. Typically, strategic planning is the outside edge of management thinking and is undertaken before one undertakes one’s operational planning (setting objectives and creating work plans). From within a strategic foresight 2.0 frame of reference, strategic planning is not to be undertaken until after one has completed one’s strategic foresight.
- **Policies:** The institution-wide management strategies that will always be used to determine one’s objectives and work plans.

CRITICAL VARIABLES

Several critical variables emerge from the above definitions. The spectra are:

Low	Degree of Certitude of One’s Judgment	High
Low	Degree of Critical Thinking in One’s Judgment	High
Low	Degree of Coherence of One’s Judgment	High
One	Range of Possible Outcomes Considered	Many
None	Degree to which One’s Judgment is Systematic	High
None	Degree of Reflexivity of One’s Judgement	High
Low	Degree of Focus on One’s Context	High
Low	Degree One’s Judgment is Inclusive/Integral	High

THREE LEVELS OF COMPETENCE IN FORESIGHT WORK

It is useful to distinguish among three levels of understanding of what is involved in thinking about the future: that of lay persons, novice practitioners and expert practitioners. Note that this typology is still under development. Your comments will be welcomed. Contact rubennelson@shaw.ca

Typical Lay Understandings

- At the surface. About obvious and somewhat siloed physical features/issues. Things that within Causal Layered Analysis are called “the litany.”
- Siloed. Each condition/issue is seen and dealt with by itself, rather than as an aspect of a wider system. The context, causal determinants and the multiple relationships and interdependencies that go with the issue, are largely ignored. The result is simple or naïve futures by telescope.
- Civilizational/Cultural Context. A fundamentally stable and familiar, rather than changing and unfamiliar, cultural/civilizational context is assumed. The reason is that this context is largely unperceived and not explicitly explored. Things (e.g. technologies) and people may change, but the backdrop context is assumed to be known and stable.
- Problem-focussed. The perceived need is to fix that which is seen to be broken or to capitalize on a feature that is seen to hold promise. The beauty of problems is that they have solutions that make them go away.
- Action-focussed. The impulse is to “do something;” to undertake quick action that will make an obvious difference in the world. There is often some degree of impatience with those who wish to ensure that one adequately perceives the situation and has thought it through appropriately, i.e. to go upstream far enough to actually understand that with which one is dealing.
- Unconscious. The unconscious, in the sense of unreflexive, personal and cultural orientations of the practitioners shape their perceptions of the situation and responses to it.
- Linear. A linear relationship between cause and effect is assumed: small causes yield small effects and big causes yield big effects.
- Naïve. The thought that serious thinking about the future may require serious training and much practice does not occur. The future is seen as belonging to everyone and everyone is said to have a right to his/her views. Therefore, the idea that some perceptions and thoughts are more substantial than others seldom occurs. When things

happen that are truly surprising, it is assumed that no one could have imagined the actual outcome. It follows that in no sense are those who are surprised to be held accountable for not seeing what was coming. Prior to arrival, surprises are simply unknowable – unknown unknowns.

- Certainty is assumed. It is assumed that there is one right answer or way of doing something, if only we could find and agree on it. In principle, good work eradicates all uncertainties.
- (What else?)

Typical Novice Practitioners

- One move from the surface. The causes of surface phenomena are seen to be important and pursued. Typically, the move is to lengthen the sense of time and broaden the sense of space, rather than deepen the sense of depth. An ecology of the future begins to emerge.
- Limited connections/systems. Some of the more obvious connections between the presenting issue and other phenomena are pursued. While the time horizons are longer and the perspectives are wider, the practitioner's understanding of the depths of human life are still essentially superficial – at or close to the surface. For example, the structure of physical things is now attended to.
- Civilizational/Cultural Context. The wider civilizational and cultural context is still largely unperceived and, therefore, assumed to be given. The idea that one can do something about one cultural/civilizational context has not yet arisen as a serious insight. Rather, one must work within the constraints that one's inherited context offers.
- Transactional Context: It is recognized that one's transactional context is change. Therefore, it is explicitly explored. (Transactional context = the persons/organizations and relationships that account for the vast number of one's direct daily transactions, e.g. family, friends, acquaintances, colleagues, customers, suppliers, etc.)
- Single sector/topic focussed. It is assumed that one can undertake high-quality foresight regarding a given sector or topic without having to take the wider cultural context into account. So, technology foresight or agricultural foresight is practiced. This is due in part to the demands of those for whom the practitioners work. Most executives are lay persons when it comes to the foresight field. Few have the humility to acknowledge that they have much to learn about foresight.
- Positivistic/Impersonal. The bias is to defend one's views with sound data. In our late Modern/Industrial culture data that is so obvious anyone can see it is seen to be better than subtle data – data that takes training to see and work with. STEEP (Society,

Technology, Economics, Environment and Politics) and STEEPV (STEEP plus Values) dominate in this frame of reference. Human emotions, spirit and consciousness are not seen to be proper drivers of change, and, typically, are ignored.

- Linear. A linear understanding of cause and effect still holds. (See above.)
- Still largely naïve. There is a tendency to judge the quality of the work being done by the degree of excitement and enjoyment of those who participate in it. Since most futures projects are still novel and exciting to most participants, it is assumed that the excitement is a sign that good work is being done. Further, the assumptions of those for whom they work are accepted as given. For example, most senior executives assume that high-quality futures work can be undertaken without raising any questions about the fundamental assumptions of Canadian culture and our modern/Industrial form of civilization or the complicity of their organizations in same. Sadly, this is not the case.
- Technology-dominated. Because new technologies are, rightly, seen as a major driver of change, it is assumed that most “solutions” will also be technology-driven. Human factors tend to be unseen and under-appreciated, both for their power and their subtlety. This bias reflects the assumptions of a modern/Industrial culture. In this, as in other ways, novice practitioners tend to be culture-trapped.
- Tool-dominated. Practitioners tend to fixate on and use a particular foresight tool that seems to work for them. They are largely unfamiliar with the wide range of tools and methods that can be utilized in good foresight work.
- Essential certainty. It is still assumed that there is one right view and solution, even if for all practical purposes it cannot be achieved. Uncertainty is seen to be present as a result of human limitations, not as a fundamental feature of reality.

Serious Professional Practitioners

- Are at home with systems thinking, complexity science, the deeply interconnected nature of dynamic adaptive living systems and the differences between personal and non-personal living systems.
- Non-linear. Understand that big efforts may make small differences and small efforts may make big differences within a complex living system. Therefore, doing the same thing over and over again, can actually lead to different results – sometimes.
- Uncertain, in principle. Understand that truly open complex living systems do not lend themselves to either predictability or certainty. While some responses may well be better than others, living on this planet offers no guarantees that one’s best efforts will be rewarded or one’s worst efforts punished.

- Reflexive. Are at home with the personal nature of all human knowing and the dynamics and subtlety of the social construction of social realities. Have become thoroughly familiar with personal and cultural influences that shape the eyes with which they see the world. Understand the power and limitations of inherited ways of seeing, thinking and acting.
- Professional. Understand that 10,000 hours is the minimum amount of time required to become truly proficient at any serious practice. This standard also applies to strategic foresight work.
- Metaphoric fluency. Understand the power of metaphors and their logic to shape human life. Are as focussed on the depths of life as its breadth or length.
- Full range of potential future outcomes. Understand that being blind-sided by an unimagined future is far more serious than fumbling a future one sees coming. Therefore, insist that the full range of possible futures be explored, even those that appear to be implausible within the dominant paradigms of one's inherited culture.
- Receptor capacity. Understand that half of good foresight work is developing the receptor capacity of those for whom one works, i.e. the capacity to understand and put to work the understandings, outputs and outcomes of good futures work.
- Community development. Understand that high-quality work requires the development of a community of interest among those who will develop and those who will utilize the insights that good foresight work creates.
- Engagement. Understand that foresight and engagement are two sides of the same coin. All foresight must include personal engagement and all future-focussed engagement must include foresight.
- Causal Layers Analysis. A formal method for digging under the surface of one's own life, culture and form of civilization. Developed independently in Australia by Sohail Inayatullah.
- Causal Layered Synthesis. A formal method for digging under the surface of one's own life, culture and form of civilization. Developed independently in Canada by Ruben Nelson.

Again, your comments are welcomed. rubennelson@shaw.ca