



Horizon scanning

Should your organisation do it and, if yes, how?

Dr Louisa Petchey, December 2019



...horizon scanning in its broadest sense **is an attempt to systematically imagine the future in order to better plan a response.** In the absence of a crystal ball, it can help organisations to detect signals, identify trends and think more inventively about what the future might hold, enabling them to capitalise on opportunities and better mitigate threats. It is a crucial activity for any organisation tasked with long-term decision-making.

The process...



Key questions to ask:

- Do we have a **good reason** to do horizon scanning?
- Do you have the **buy-in** to support horizon scanning?
- Do the **resources** you have for horizon scanning match the expectations?
- Are the **obstacles** to using horizon scanning findings being addressed?

If the answer to these questions isn't **yes**, you need to rethink...



Step 1: Identify need

Horizon scanning helps you to...

- Gather **information about emerging trends and developments** that could have an impact on the policy of strategy area in the future
- Explore how these trends and developments might combine and **what impact they might have**
- Support decision-makers to make choices that are more **resilient to future shocks, surprises and uncertainty**
- **Engaging a range of people in futures thinking**, so they increase their insight into the changing environment, and gathering a variety of opinions

Why would **your organisation** want to do it?



Step 1: Identify need

Do

- **Understand what you are trying to influence**
- **Channel results into a decision process**

Don't

- **Inflate the potential to find meaningful scan 'hits' – they are hard to find**
- **Oversell the benefits of networking/ learning at the expense of informing decisions**



Step 2: Invite participants



Anyone you want to involve in futures work. Participants can come from inside or outside the team or organisation.

Start with the internal team and then think about inviting externals who have a good knowledge of the policy area.

To keep the process manageable, you may wish to start with no more than 10 people. You can expand the network at a later date once you have worked out the logistics of your process.

Who would **your organisation** want to involve?



Step 2: Invite participants

Do

- **Decide in advance the extent to which you will use external/ new voices rather than rely on internal/ the 'usual suspects'**

Don't

- Use security/ privacy concerns as a reason to limit the participation of people outside your team

Step 3: Collect relevant information



- Surveys
- Workshops
- Conferences
- Interviews
- Data mining



Horizon Scanning helps participants read news articles and journals differently and develop a long-term perspective



Step 3: Collect relevant information

Do

- **Decide on the scope of your search i.e. broadly at more than one area or deeply at specific areas**
- **Look outside the box – balancing ‘traditional’ versus non-traditional sources of data**
- **Look for ‘game changers’**

Don't

- Dismiss information as rubbish out of hand
- Don't over collect at the expense of relevance
- Don't use uncertainty or change as a reason not to think through the long-term implications



Step 3 & 4: Collect and analyse information

- Horizon scanning is best run in **bursts of several weeks**, or can be run throughout a project to continually build intelligence.
- Each scanner can be asked to **produce one 'scan' per week** that answers the following questions:

1) What is the scan about?

2) How is this related to the policy or strategy area?

3) Why is this important and what has it made you think about?

- The scan can contain links to the original source material/ any other relevant or interesting articles. Ideally, **each scan should be a single page only**.

What process would **you** want to use for scanning?
Who, how often and for how long?



Step 3 & 4: Collect and analyse information

Frequency	<ul style="list-style-type: none">• Ongoing, with regular reporting?• A special request i.e. to support a specific piece of work?• Periodic e.g. timed to certain events like annual planning?• Ad hoc i.e. acting on interest as and when and reporting as needed?
Scope	<ul style="list-style-type: none">• Wide or narrow?• Specific issues or whatever comes up?
Difficulty	<ul style="list-style-type: none">• Systematically structured or more organic?• Small or large number of people involved?
Resource requirements	<ul style="list-style-type: none">• Dedicated resources or within existing roles?• Part of or separate from other work e.g. annual planning?• Specifically funded or within current budgets?



Step 3 & 4: Collect and analyse information



Horizon scanning is relatively straightforward but does rely on intuition and insight – which can feel counterintuitive to those who are more practiced in evidence based strategic thinking.


The hardest part for many authors is knowing whether something they have read is interesting or different enough to include in the scan. Scanners should always err on the side of being irrelevant.

Step 4: Analyse information

Political		
<p>► BIS underestimating value of student loans that won't be repaid</p>		
<p>Key words: student loans, debt, BIS, government policy Last updated: 14 February 2014</p>		
<p>Impact on the business ★★★★★ Certainty ★★★★★ Timescale short medium long</p>		
<p>Baseline measure: unrecoverable student debt currently stands at £18 billion</p>		
<p>Student experience: ●</p>	<p>University plan: ●</p>	<p>Flexibility and efficiency: ●</p>
<p>Summary: The Public Accounts Committee (PAC) report published on 14th February 2014 highlights that government consistently over-estimates annual repayments on student loans and consistently under-estimates the debt that will never be repaid.</p>		
<p>Implications for [Client University]: Government efforts to tighten administration of loans might lead to student numbers reducing or to higher student numbers staying at home. Perhaps more likely, students will want to make their money go even further. They may wish significant differentiation of services or increased choice at the budget end; they may seek higher flexibility in accommodation packages or in accommodation bundled together with other services.</p>		

What information would be important for **your organisation** to bring together?

HORIZON SCANNING



Comisiynydd
 Cenedlaethau'r
 Dyfodol
 Cymru

Future
 Generations
 Commissioner
 for Wales

Title:	More than just affordable
Linked priority area:	Housing
Source:	10 Innovative Affordable Housing Designs For Sustainable Living https://architizer.com/blog/inspiration/collections/affordable-housing/
Date published:	

What is changing?

Recognising that being affordable isn't the only goal. Also want them to be sustainable and create communities. E.g. 1) **Via Verde**, New York City: 222-unit affordable housing complex built on a brownfield site. Certified as sustainable (LEED), a display in the main lobby shows energy statistics, such as solar panel outputs in real time. The design includes an upward spiralling courtyard garden and social space and 34,000 sq ft of green roofs that offer active gardening, reduce storm water run-off, and enhance building insulation.

2) **60 Richmond Street East**, Toronto: An urban infill project that used reclaimed materials and energy-saving strategies. Features a resident-owned and operated restaurant and training kitchen on the ground floor. Fruit and veg is grown on the 6th floor terrace to help supply the restaurant with food.



3) **Fillmore Park**, San Francisco: Designed for residents who earn 70 - 100% of the area's medium income. It is designed around a central courtyard to create a social 'village feel' despite the central urban location.

Why could this be important?

It sees the construction of new affordable homes not just as a way of providing people with somewhere to live, but of creating better communities while respecting environmental sustainability needs.

What else did this make you think about?

Co-localisation of other key services within larger projects e.g. pharmacies/ areas for exercise etc. How many opportunities are there in Wales to do something of this scale? All of these examples are inner city, redesigning brownfield. To what extent is this viable in Wales?

Importance? <i>How important is this to the priority area?</i> <i>Move the circle</i>	<div style="display: flex; justify-content: space-between;"> Very important Not important </div> 	
Certainty? <i>How certain is this trend?</i> <i>Move the circle?</i>	<div style="display: flex; justify-content: space-between;"> Very certain Very uncertain </div> 	

Acting today for
a better
tomorrow

Name of scanner:	Louisa Petchey
Date of scan:	11 April 2019



Step 4: Analyse information

Do

- Explain why the scanning ‘hit’ matters – the ‘so what?’
- Consider all the ‘hits’ together, rather than just on their own
- Look for opportunities as well as challenges and risks
- Understand what you can and can’t change

Don’t

- Re-hash old ground
- Overestimate the importance of the short-term and underestimate the long-term
- Only look at evidence that reinforces your current view
- Try and make your findings support the current approach



Step 5: Communicate findings

- A nominated person can be responsible for collating and arranging the scans.
- They can collate them into a report, organised by theme or other formats e.g. newsletters, visuals, scenarios.

How would **your organisation** want to communicate the findings?
Who to, how often, in what format?



Step 5: Communicate findings

Do

- **Think about how you communicate not just what**
- **Balance technical data with techniques like analogies, storytelling and visual images**

Don't

Forget that people:

- Prefer information that confirms their current views
- Perceive immediate threats as more important than future ones
- Have a finite capacity for worry



Step 6: Use findings



This distilled information should challenge what we take for granted, shake-up complacency, and contribute to a re-think of tasks and activities that we might want to abandon or create.

A critical aspect of all approaches is that they are useful to decision-makers; helping them see around corners. To be fruitful, any horizon scanning approach must provide a channel into significant decision processes.

What would **your organisation** want to use it for?



Step 6: Use findings

Do

- Be willing to challenge
- Help decision-makers use the findings to question what they believe to be true, what they want to achieve and how they will achieve it

Don't

- Not use the findings!



Summary

Should we do it?

- Do we have a **good reason** to do horizon scanning?
- Do you have the **buy-in** to support horizon scanning?
- Do the **resources** you have for horizon scanning match the expectations?
- Are the **obstacles** to using horizon scanning findings being addressed?

If yes, how do we do it?

1. **Identify need** – *why would we want to do it?*
2. **Invite participants** – *who would we want to involve?*
3. **Collect relevant information** – *what process would we want to use for scanning? Who, how often and for how long?*
4. **Analyse findings** – *how would we want to collate the information? What would be important for us?*
5. **Communicate findings** – *how would we like to communicate the findings? Who to, how often, in what format?*
6. **Use findings** – *what would we want to use it for?*



References

- K Delaney. Innovation Tool Kit: A practical guide: Introduction to horizon scanning in the public sector. June 2014. Available at: [https://www.researchgate.net/publication/264534064 INNOVATION TOOL KIT - Horizon Scanning](https://www.researchgate.net/publication/264534064_INNOVATION_TOOL_KIT_-_Horizon_Scanning)
- Government Office for Science. The Futures Toolkit Edition 1. November 2017. Available at: <https://www.gov.uk/government/publications/futures-toolkit-for-policy-makers-and-analysts>