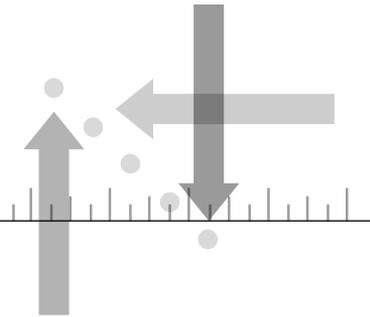

FUTURE WHEEL



Purpose

The future wheel is a future-oriented technique. Future wheel activities are conducted to help participants analyze and explore effects of a trend, event, circumstance, or issue. As such, this technique can be a useful tool for conducting structured brainstorming, determining needs, planning strategically, and building consensus.

Future wheels are laid out as graphic depictions with the future event in a circle in the center, the first-order effects in the first circle out from the event, the second-order effects in the second circle out from the event, and so on. Future wheel activities can potentially be used to explore effects of many different things (issues, trends, and events), so they can be used in virtually any setting (organization, community meeting, school, and so on).

Needs Assessment Applications

The future wheel has a variety of different needs assessment applications, as follows:

- Forecast potential future scenarios.
- Project future trends.
- Systematically explore the possible effects from a current situation or trend.
- Analyze the possible pattern of effects for a potential future event or trend.
- Forecast implications for a variety of alternative circumstances.

- Determine the potential effects of a variety of potential performance solutions.
- Collect data on a group's perspectives on current and future situations and trends.

Advantages and Disadvantages

Advantages

- The future wheel is easy to use and does not require extensive training for the facilitator.
- It is resource lean and, therefore, can be done anywhere, anytime.
- It supports structured brainstorming.
- It is intuitive to the participants.
- It is not time-intensive and can be conducted in one, relatively brief, group session.
- The future wheel can be used at any time in the needs assessment or strategic planning process.
- It can be adapted for use in virtually any context: business and industry, community, personal.
- It promotes systematic thinking about complex relationships between causes and consequences.
- Through the use of concentric circles, it clearly identifies the common bond that all identified effects have to the topic at the center of the future wheel.

Disadvantages

- Because future wheels are laid out in a sequential structure around a central topic, they may be too superficial to identify the complexities of a series of contributing factors that may all have differing levels of influence on the effects identified.
- They may not clarify whether effects are related to each other by causality or by correlation. Indeed, because of the use of the concentric circles, a future wheel may lead individuals to incorrectly believe there

is a causal relationship between two effects, when those effects are, in fact, linked only by correlation.

- Future wheels present the potential risk that one or more individuals will believe that effects identified through a future wheel will, in fact, happen when in actuality they are merely “hypotheses” or “best guesses.”
- The relatively rudimentary nature of future wheels makes it hard to represent projected time lines associated with the effects added to the future wheel. Such time lines can be an essential ingredient for problem and solution analysis.
- Because participants engage in subjective and projective thinking to create it, a future wheel should be used only as one of many sources of information for more systematic and empirical analysis. It cannot, by itself, be used for coming to conclusive decisions.

Process Overview

The procedure for conducting a future wheel activity is fairly simple and easy to implement. It consists of two key phases: preparation and implementation.

Preparation

1. From the list of information required for the needs assessment, identify a trend, event, or question for the future wheel activity. This trend, event, or question will be the future wheel’s main topic. A question might be “What is the result if you continue doing as you are doing?” and an event might be “Effect of talent loss on organizational productivity.” The topic should
 - a. Focus on current or anticipated future events and their consequences.
 - b. Be suited to exploration through a small group interactive session.
2. Invite a small group of people (preferably between 8 and 12 individuals) to participate in the activity. If you intend to use this exercise with more than a dozen or so people, it is recommended that you run the activity multiple times.
3. Determine whether the topic of the future wheel merits the use of outside resources during the actual activity. If so, search for resources that provide key information on the theme or question that you have identi-

fied as being the subject for the future wheel activity. Those resources will be shared with the group of participants during the actual activity. For example, you may want to gather the following:

- a. Descriptions of future events or trends from the professional literature
 - b. Results from future or projection studies
 - c. Results from other trend analysis or future scenarios
 - d. Data that provide insight on current or alternative future scenarios
4. Gather the resources required for conducting the activity.
 - a. Flip charts (or confirm that you will be in a room with a whiteboard)
 - b. Markers in a variety of colors

Implementation

Preparing participants

1. Begin by warming up the group. Introduce participants to the concept of the future wheel, and explain the process for the activity. Emphasize that all participant contributions are considered valuable and that group members are encouraged to participate actively. Explain that the future wheel is laid out by order of consequences:
 - a. Primary (or first-order) effects: The most immediate consequences of the future wheel's key topic.
 - b. Secondary (or second-order) effects: The most immediate consequences following from the first-order consequences. Depending on the topic, you may also opt to include third- or fourth-order effects in the future wheel before continuing.
 - c. Implications or opportunities: The final wheel of the activities focuses on the implications or opportunities that come from the identified effects.
2. Tell the participants the approach that will be used to add an effect to the future wheel. Some options include the following:
 - a. Asking participants to brainstorm ideas for effects and adding those effects as they are being identified and without evaluating them first.
 - b. Discussing each idea and evaluating the plausibility of the idea. If there is a general consensus that the potential effect is plausible, it is added to the concept map.

3. Introduce participants to the key topic for the future wheel activity. Discuss the relevance and importance of understanding the key event. If you are using supplementary resources, provide all the group members with copies of the background resources that you have prepared, and give them time to review the resources.

Creating the future wheel

1. Write the future wheel's key topic (for example, youth unemployment, aging populations) in the center of your drawing space, and place a circle around it.
2. Ask the group to identify the first-order effects. As first-order effects are identified, draw lines out from the center circle (the lines are referred to as "spokes"), and write the first-order effects at the end of the lines. After all key first-order effects have been identified, draw a circle that encloses all the first-order effects.
3. From here, tell participants to shift their focus away from the future wheel's key concept and to instead focus on the first-order effects that were identified. Ask participants to identify the key potential results from the first-order effects. Add those effects to the future wheel by drawing spokes from the circle around the first-order effects and by writing the second-order effects at the end of each of those spokes. After all key second-order effects have been identified, draw a circle around all of them.
4. Continue this process until there is a consensus that the sequence of implications for the key topic is evident.
5. Finally, identify implications or opportunities that emerge from the identified effects, which could include, for example, new programs or policies that will improve performance in relation to the identified issues. The key to this final step is to introduce activities (or solutions) into the discussion.

Discussing and interpreting the future wheel

1. After the future wheel has been completed, give the participants an opportunity to look it over and to synthesize the information in it.
2. Initiate a discussion on the key topic of the future wheel by asking questions targeted to the purpose of the needs assessment. Themes you may want to use to guide the discussion are the following:
 - a. Evaluation of the implications of the future wheel's key topic

- b. Desirable vs. undesirable primary, secondary, or tertiary effects
- c. Effects of the present situation on potential future events
- d. Approaches to avoiding negative outcomes

Examining alternative approaches to using future wheels

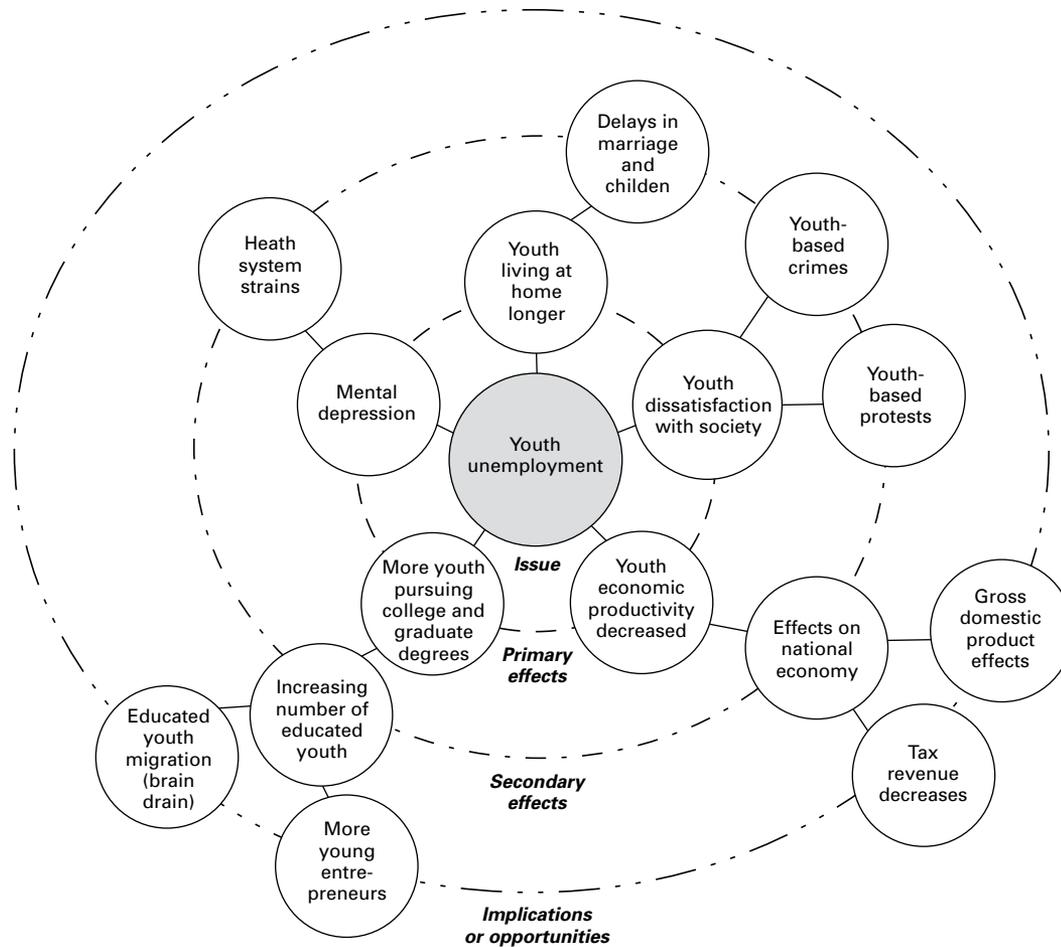
Future wheel activities can be used in many different ways. Here are some alternative approaches:

1. Invite a panel of experts to participate in the future wheel activity. After the key topic of the future wheel has been identified, the panel should discuss how the key event may affect a variety of themes (for example, recruitment, talent management, profit margins, and so on). Each panel member then should work individually to write down ideas related to the themes raised in the discussion. Use a round-robin approach to ask panel members to contribute their ideas. After a comprehensive list has been created, they should place their ideas in labeled categories. The future wheel can be created by adding the labeled categories as primary, secondary, or tertiary effects.¹
2. The future wheel activity can also be used as an approach for forecasting the implications of alternative solution scenarios. To use this approach, generate a scenario (for example, the implementation of performance-supporting solutions to improve customer service), and select one aspect from that scenario to explore (for example, an electronic performance support system, or EPSS). Ask participants to identify the specifics of what the selected item can achieve (that is, what functions the EPSS can perform in light of the need), and add those participant contributions as primary effects. Next, ask participants to identify what is required for them to make the items in the “primary effects” section of the future wheel a reality (for example, what resources and applications are required to create and implement the functions of the EPSS). Add this information as the “secondary effects.” The future wheel is then elaborated with additional effect levels.² (See the example in figure 3B.6.)

Tips for Success

- What key topic you select for the future wheel activity is a critical issue. Make sure that you thoroughly evaluate potential key topics (and how they are formulated) by looking at the information required from the

Figure 3B.6 Sample Future Wheel



Source: Based on <http://www.knoke.org/lectures/futureswheel.htm>.

needs assessment, analyzing those requirements, and potentially soliciting feedback from outside experts.

- Carefully select participants for the future wheel activity on the basis of the activity's goal. For example, the purpose of the activity is to gather expert insight about the potential implications of a current situation or trend; therefore, select participants who can knowledgeably contribute to such an analysis.

- In a clear way, tell participants the approach that will be used for adding information to the future wheel. If the future wheel is being used for anything other than general brainstorming, it is essential to evaluate ideas carefully before they are added to the future wheel.
- Take the time to thoroughly discuss the future wheel after it has been created. At this point, you can stimulate a creative and informed discussion that will be based on a common source of information (the future wheel).

Notes

1. Based on Witkin and Atschuld (1995).
2. Adapted from <http://abhijitkohli.googlepages.com/futureswheel>.

Reference

Witkin, Belle Ruth, and James W. Altschuld. 1995. *Planning and Conducting Needs Assessments: A Practical Guide*. Thousand Oaks, CA: Sage Publications.

Websites

A four-step example of a future wheel is available at <http://www.knoke.org/lectures/futureswheel.htm>.

“Future Wheels: Interviews with 44 Global Experts on the Future of Fuel Cells for Transportation and Fuel Cell Infrastructure” is available at http://www.navc.org/Future_Wheels_I.pdf.

A short description and examples of future wheels are available at <http://jcfowers1.iweb.bsu.edu/rlo/tarelevance.htm>.

Additional Tools

A downloadable template of a future wheel is available at <http://www.globaleducation.edna.edu.au/globaled/go/cache/offonce/pid/1835;jsessionid=050A14CB101EAF863AE979C80461FCB3>.