

4 SELECTION OF TOOLS

In this section you will:

- **Learn** about the main considerations that will be involved in helping you to choose the most appropriate futures tool for your exercise
- **Use a diagnostic tool** related to the motivations and scope for your futures exercise to aid you in your selection

The selection of futures tools and methods appropriate for the context, objectives and resources of the futures exercise (see previous sections) is a crucial stage of a futures exercise. Designing and launching a futures exercise without careful selection of the appropriate futures tool and method will almost inevitably lead to a failure to achieve the required results, remove the appetite to use futures approaches on subsequent occasions and could even undermine the credibility of the lead bodies and committed stakeholders. There are therefore considerable risks and rewards at stake at this stage of the futures exercise.

This section therefore facilitates the identification of tools appropriate to the objectives and circumstances of the regional actors' project. The approach includes a diagnostic element although the underpinning principle is facilitative and not prescriptive.

Most futures exercises use a mixture of methods to achieve their aims. In the FUTURREG toolkit approach, this mixed approach is advocated and the tools should be considered both individually and in parallel to ensure that they address the project aims from a number of different angles.

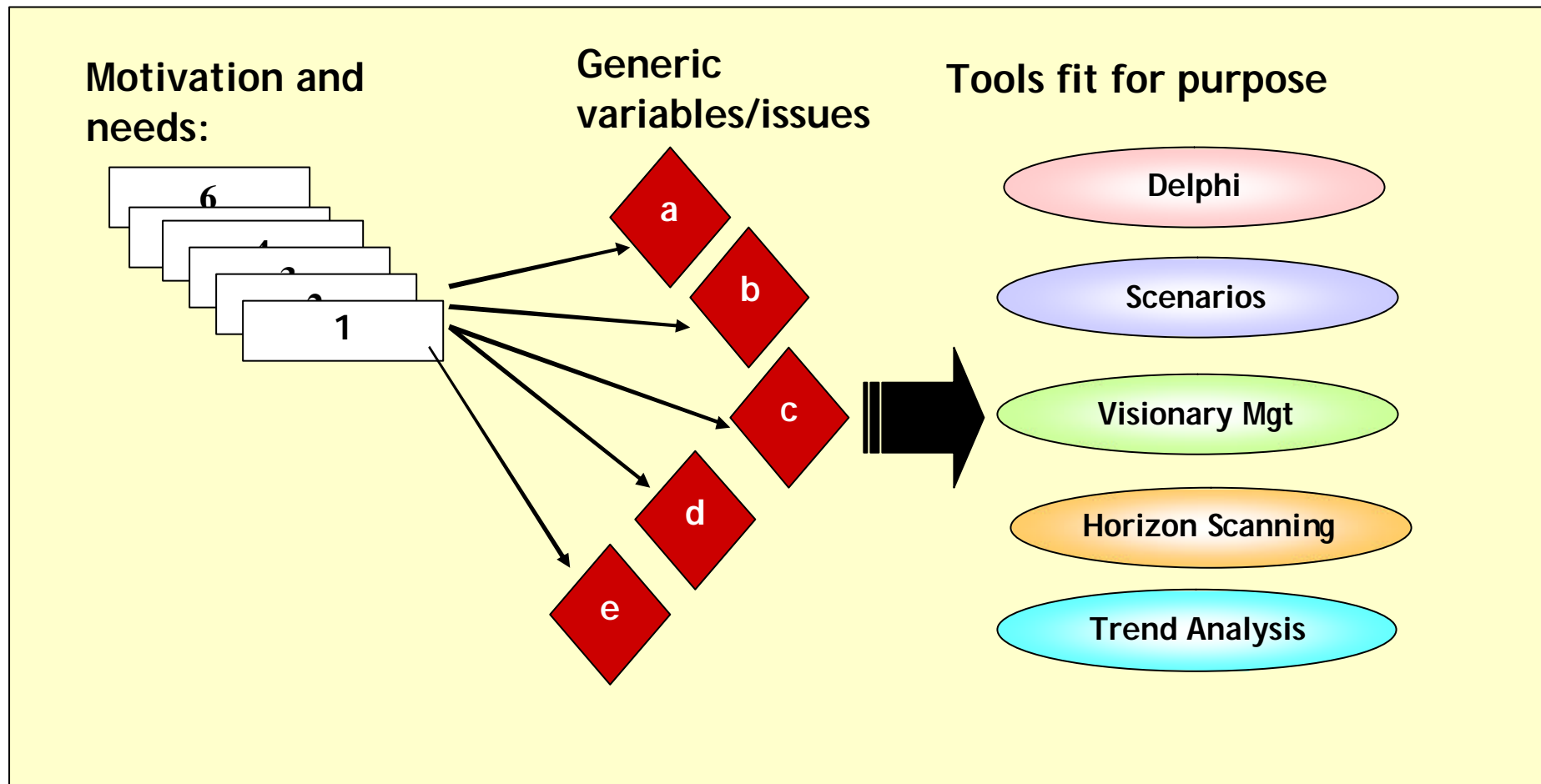
Although it is possible for regional development actors to use the toolkit independently, the use of experts is beneficial to ensure that the general principles contained within the toolkit are adapted to an optimum level for the local context and objectives of the specific exercise.

Structure of the approach

The facilitative approach consists of three levels:

1. **Typical motivations** - 'classic' examples based on the typical motivations underpinning the decision to use a futures approach. A cross-section of these is presented to represent the typical situations where futures tools can add value. (This list presented is not exhaustive, although regional actors should be able to identify examples that are comparable or equivalent to their own.)
2. **Generic variables** related to classic examples: this level will extract the variables that are relevant to the motivation and classic examples
3. **Outline of tools fit for purpose**: this level will identify tools that address the issues outlined under variables

STRUCTURE OF THE SELECTION APPROACH



'DIAGNOSTIC' MATRIX OF MOTIVATIONS, VARIABLES AND TOOLS

		Variables/ Issues				
		Engaging stakeholders	Assessing key external influences/drivers for the organisation/region	Understanding current position and likely future path	Soliciting expert views	Networking and communication of key issues
Motivations	Developing a new strategy in the region	Scenario building Visionary management Futures workshop	Scenario building Trends analysis	Trends analysis	Delphi	Futures workshop
	Understand the impact of external influences on the organisation	Delphi Futures workshop	Scenario building Futures workshop		Delphi Horizon scanning	Horizon scanning
	Help the region through a period of economic restructuring	Visionary management Scenario building	Scenario building	Trends analysis	Delphi Expert panel	
	Decide in which science and technology areas/sectors to invest	Scenario building Trends analysis	Scenario building	Trends analysis	Delphi Multi Sector Qualitative Analysis	Scenario building
	Generate widespread dialogue about the future of the region	Visionary management Scenario building		Trends analysis	Delphi	Scenario building Visionary management
	Build organisational and regional capacity to deal with the future	Scenario building	Horizon scanning Scenario building		Horizon scanning Delphi	
	Provide anticipatory intelligence for actors in the region	Scenario building	Horizon scanning	Trends analysis	Horizon scanning Trends analysis Delphi	
	Challenge mindsets, shake off complacency	Scenario building Futures workshop	Trends analysis Futures workshop			Scenario building Futures workshop

Users of the toolkit may 'navigate' their way through the Diagnostic Matrix of Motivations, Variables and Tools to identify tools that are appropriate for their particular needs and exercise.

For example, for those actors interested in developing a new strategy for the region using a futures-based approach, engaging stakeholders might be undertaken through scenario building, visionary management and/or futures workshops. Assessing key external influences and drivers for the region could be achieved through scenario building and/or trend analysis.

The Diagnostic Matrix is designed to facilitate users in identifying tools that are appropriate for the objectives and purpose of their exercise. This should constitute a first step in establishing the detailed requirements of the exercise in terms of methodology, approaches and resources. The complexity and diversity of each exercises necessitates a second step - of more detailed analysis. Users will often be supported by experienced external agencies (e.g. consultants) in this process although the more detailed information on tools and case studies contained within this toolkit (and in the accompanying documentation) provides a basis for users to conduct their own analysis and research. Most regional development users are assumed to have multiple tasks to oversee simultaneously and may feel that, in the scope of the exercise, an expert intervention is more (cost) effective.

You should now:

- Understand the main motivations and issues involved in using futures tools
- Understand which tools are generally used for specific purposes (through a diagnostic process)
- Be ready to do more detailed analysis of individual futures tools.