

*Twenty-One Trends  
That Will Require Inspirational Leadership*

# **Futures Tools... for Engagement and Planning**

**Virginia Association of School Superintendents  
VASS Spring Conference, Roanoke  
May 8, 2017**

## **Agenda**

- 11:15 a.m.      **Introducing Futures Tools for Planning and Engagement**  
*An introduction to universal processes for thinking, planning, and creating a future. Trend Spotting, Trend Analysis, Issue Analysis, Gap Analysis, Flexibility/Innovation Analysis, Historical/Defining Moments Analysis, Reputation Analysis (Aspirational Leadership), Scenarios, SWOT, Community Conversations, Futures Councils.*
- 11:25 a.m.      **Trend Analysis...Implications of the Trends**  
**What are implications of these trends for:**
  - How we operate our schools and our education system?
  - What all of our students need to know and be able to do to be prepared for life in a fast-changing Global Knowledge/Information Age?  
(Academic Knowledge, Skills, Behaviors, Attitudes or Dispositions)
  - Economic growth and development and quality of life in our community?
- 11:35 a.m.      **Issue Analysis, Probabilities and Impacts**  
*"Let's manage the issues before the issues manage us."*
- 11:50 p.m.      **Gap Analysis**  
*In complete sentences, describe the schools and schools systems we need to get students ready for life in a Global Knowledge/Information Age...even an Age of Knowledge Creation and Breakthrough Thinking.*
- 12:05 p.m.      **Future-Focused Leadership**  
**Communicating Meaning...Not Just Information.**  
Inspirational, Intellectual Leadership...Remembering the *Why*
- 12:15 p.m.      **Thank You, Enjoy the Conference, Q&A**

**Presenter: Gary Marx, President, Center for Public Outreach, Vienna, Virginia.**

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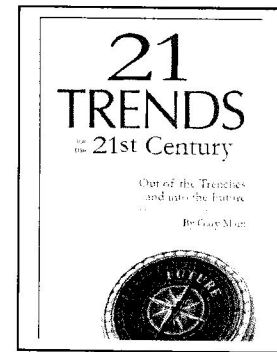
Author of *Twenty-One Trends for the 21<sup>st</sup> Century...Out of the Trenches and into the Future*, published by Education Week Press, available at [www.edweek.org/go/21Trends](http://www.edweek.org/go/21Trends), and *Future-Focused Leadership*, published by ASCD.

# ***Twenty-One Trends for the 21<sup>st</sup> Century: Out of the Trenches and into the Future***

**A book by Gary Marx**

*Published by Education Week Press, Editorial Projects in Education,  
[www.edweek.org/go/21Trends](http://www.edweek.org/go/21Trends)*

In this new book, author, international speaker, education leader, and futurist Gary Marx presents individual chapters about an array of massive trends that have profound implications for everyone, including our students, schools, colleges and universities, communities, states/provinces, and nations. He also suggests ways to address them. Those trends include:



## **Demographic Sphere:**

- **Generations:** Millennials will insist on solutions to accumulated problems and injustices and will profoundly impact leadership and lifestyles.  
*GIs, Silents, Boomers, Xers → Millennials, Generation E*
- **Diversity:** In a series of tipping points, majorities will become minorities, creating ongoing challenges for social cohesion.  
*Majority/Minority → Minority/Minority   Diversity = Division ↔ Diversity = Enrichment  
Exclusion ↔ Inclusion*  
(Worldwide: Growing numbers of people and nations will discover that if we manage our diversity well, it will enrich us. If we don't manage our diversity well, it will divide us.)
- **Aging:** In developed nations, the old will generally outnumber the young. In developing or less-developed nations, the young will generally outnumber the old.  
*Younger → Older   Older → Younger*

## **Technology Sphere:**

- **Technology:** Ubiquitous, interactive technologies will shape how we live, how we learn, how we see ourselves, and how we relate to the world.  
*Macro → Micro → Nano → Subatomic   Atoms → Bits  
Megabytes → Gigabytes → Terabytes → Petabytes → Exabytes → Zettabytes (ZB)*
- **Identity and Privacy:** Identity and privacy issues will lead to an array of new and often urgent concerns and a demand that they be resolved.  
*Knowing Who You Are ↔ Discovering Who Someone Thinks You Are.  
What's Private? ↔ What's Not?*

## **Economic Sphere:**

- **Economy:** An economy for a new era will demand restoration and reinvention of physical, social, technological, educational, and policy infrastructure.  
*Industrial Age Mentality → Global Knowledge/Information Age Reality  
Social and Intellectual Capital → 21<sup>st</sup> Century Products and Services*
- **Jobs and Careers:** Pressure will grow for society to prepare people for jobs and careers that may not currently exist. *Career Preparation ↔ Employability and Career Adaptability*

## **Energy and Environmental Sphere:**

- **Energy:** The need to develop new sources of affordable and accessible energy will lead to intensified scientific invention and political tension.  
*Energy Affordability, Accessibility, Efficiency ↔ Invention, Investment, and Political Tension.*
- **Environmental/Planetary Security:** Common opportunities and threats will intensify a worldwide demand for planetary security.  
*Personal Security/Self Interest ↔ Planetary Security,  
Common Threats ↔ Common Opportunities*
- **Sustainability:** Sustainability will depend on adaptability and resilience in a fast-changing, at-risk world.  
*Short-Term Advantage ↔ Long-Term Survival  
Wants of the Present ↔ Needs in the Future*

(over)

## International/Global Sphere:

- **International/Global:** International learning, including relationships, cultural understanding, languages, and diplomatic skills, will become basic.  
*Isolationist Independence ↔ Interdependence*  
(Sub-trend: To earn respect in an interdependent world, nations will be expected to demonstrate their reliability and tolerance.)

## Education and Learning Sphere:

- **Personalization:** In a world of diverse talents and aspirations, we will increasingly discover and accept that one size does not fit all.  
*Standardization → Personalization*
- **Ingenuity:** Releasing ingenuity and stimulating creativity will become primary responsibilities of education and society.  
*Information Acquisition → Knowledge Creation and Breakthrough Thinking*
- **Depth, Breadth, and Purposes of Education:** The breadth, depth, and purposes of education will constantly be clarified to meet the needs of a fast-changing world.  
*Narrowness → Breadth and Depth*

## Public and Personal Leadership Sphere:

- **Polarization:** Polarization and narrowness will, of necessity, bend toward reasoned discussion, evidence, and consideration of varying points of view.  
*Narrowness ↔ Open Mindedness    Self Interest ↔ Common Good*
- **Authority:** A spotlight will fall on how people gain authority and use it.  
*Absolute Authority → Collaboration    Vertical ↔ Horizontal*  
*Power to Impose ↔ Power to Engage*
- **Ethics:** Scientific discoveries and societal realities will force widespread ethical choices.  
*Pragmatic/Expedient → Ethical*
- **Continuous Improvement:** The status quo will yield to continuous improvement and reasoned progress. *Quick Fixes/Status Quo → Continuous Improvement*

## Well-Being Sphere:

- **Poverty:** Understanding will grow that sustained poverty is expensive, debilitating, and unsettling.  
*Sustained Poverty ↔ Opportunity and Hope*
- **Scarcity vs. Abundance:** Scarcity will help us rethink our view of abundance.  
*Less ↔ More    What's Missing? ↔ What's Possible?*
- **Personal Meaning and Work-Life Balance:** More of us will seek personal meaning in our lives in response to an intense, high tech, always on, fast-moving society.  
*Personal Accomplishment ↔ Personal Meaning*

These trends were identified by author Gary Marx, president, Center for Public Outreach, Vienna, Virginia, 703-938-8725, [gmarxcpo@aol.com](mailto:gmarxcpo@aol.com). Web Site: [GaryMarxCPO.com](http://GaryMarxCPO.com).

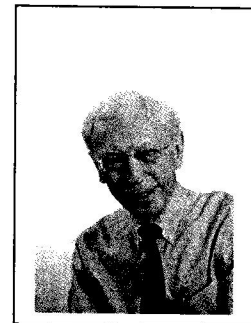
His book, *Twenty-One Trends for the 21<sup>st</sup> Century: Out of the Trenches and into the Future*, includes observations from a distinguished international Futures Council 21. Copies are available from:

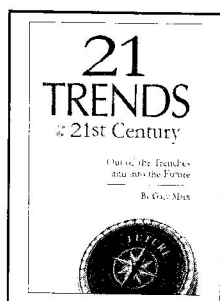
**Education Week Press**--[www.edweek.org/go/21Trends](http://www.edweek.org/go/21Trends) (print and electronic)

A Guide version of the book for broad distribution to staff and community is available at <http://www.edweek.org/ew/marketplace/books/a-guide-to-twenty-one-trends-for-the.html>

**Amazon**--<http://www.amazon.com/Twenty-one-Trends-21st-Century-Trenches/dp/1939864046> (print and Kindle)

**Barnes & Noble**--<http://www.barnesandnoble.com/w/twenty-one-trends-for-the-21st-century-gary-marx/1119436648> (Nook)

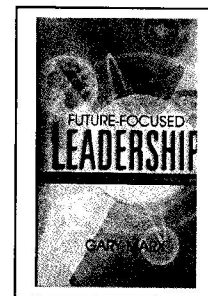




# Futures Tools

## For Planning, Engagement, Strategy Development, and Staying in Touch

Gary Marx, author of *Twenty-One Trends for the 21<sup>st</sup> Century* as well as *Future-Focused Leadership*, developed this brief explanation of several "Futures Tools" that are often employed for planning, engagement, strategy development, and for staying in touch with people and ideas.



### Trend Spotting

By definition a trend is "a direction or movement, a prevailing tendency or inclination," according to Webster's Dictionary. Issue Management Founder Howard Chase notes that, "trends are detectable changes that precede issues." We can spot trends in many ways: being aware, curious; doing research, reading, and viewing; maintaining topic/issue files and considering frequency analysis; devoting agenda time to identifying issue; asking groups to track issues; appointing Futures Councils; and holding Community Conversations. Marx urges every one, every institution, and every community to be a future-focused leader, trend spotter, and trend setter.

### PEST or STEP

Invite groups to identify political, economic, social, and technological issues that may have implications for our future. If calling the process PEST doesn't seem appropriate, call it STEP.

### Trend Analysis

Engage staff and community, perhaps both, in considering implication of trends such as those found in *Twenty-One Trends for the 21<sup>st</sup> Century*, for how we operate our schools and colleges, what our students need to know and be able to do, and for economic growth and development in the community. Some trends send us strong signals and others weaker signals. We need to be in touch with both.

### Issue Analysis

Again, engage staff, community, and others in identifying issues using the Probability/Impact Matrix. After identifying a range of issues, ask table groups of participants how they would rate each one on the *probability or likelihood* that it will become a major issue (e.g. 10 percent, 50 percent, 90 percent). Then have the groups consider what each issue's *impact* will be, if it becomes major, on a scale of high, medium, or low. If an issue is high in impact and high in probability, we'd better pay attention and manage the issue or the issue will manage us. By definition, an issue is a trend, condition, problem, wildcard, or critical uncertainty that could, does, or will affect the successful accomplishment of our goals.

### Flexibility/Innovation Analysis

Engage people in coming up with perhaps six clear one-sentence individual descriptions of a flexible/innovative organization. Then ask them to rate our organization on a scale of 1 to 10 based on how well each of these ideals describes our current situation. The process helps point out the distance we might have to go to reach those ideals. Continue the discussion with ideas about how we can get from where we are to where we'd like to be...to close the gap. Getting there often involves behavior change, not only programs.

### Historical/Defining Moments Analysis

With a group, identify one or two notable successes and one or two persistent problems. Consider decisions we made at the beginning of a program, process, or institution. Explore successes and evolving problems, if possible pinpointing defining moments that affected our hoped-for success. The process is a way of learning from past experience as we consider our future.

### Gap Analysis, Characteristics of the System We Need

With involvement of a number of table groups, identify from 6 or 10 distinct full-sentence descriptions of the organization we need, in the case of schools and colleges, to get students ready for life in a Global Knowledge/Information Age, even and Age of Knowledge Creation and Breakthrough Thinking. Then ask these table groups to rate our organization on a scale of 1 to 10 based on how well each of our ideals describes the distance we might have to go to reach those ideals. Continue the discussion with ideas about how we can get from where we are to where we'd like to be...again, to close the gap.

## Purposes of Education

Engaging people, review the list of possible purposes for education included in *Twenty-One Trends for the 21<sup>st</sup> Century*, Chapter 14. In small groups, consider whether those purposes are individually appropriate and what other purposes might be needed. In seeking perspective and putting what we do in context, we need to raise this discussion to make clear to our communities that our true purposes go beyond competing disciplines to preparing people for the future.

## Scenario Development

Again, engaging an appropriate group, develop up to three scenarios, short stories that describe the future we would like to see. In doing each of those scenarios, we will need to test variable assumptions. The process will encourage “What If?” and “Then What?” discussions and keep us in touch with alternative futures. A scenario should be a possible picture of a plausible future, according to noted futures thinker Peter Schwartz.

## SWOT

Generally toward the conclusion of our planning process, we engage people in identifying our organization’s strengths, weaknesses, opportunities, and threats in pursuing our plan. The process stirs invaluable discussion and a demand for thinking about what we will do to make the most of strengths and opportunities and to address weaknesses and threats.

## Community Conversations and Futures Councils

*Community Conversations* bring together generally from 50 to 300 people from staff and community, often representing many walks of life, possibly some students. They hear a presentation about trends. Then, in small groups, they identify possible implications of the trends using trend analysis, identify and sort issues using issue analysis, and conceive of descriptions for the institution we might want to become, using gap analysis. The group is instructed that the purpose is not to make policy, develop programs, make decisions, or provide a forum for someone to grind an axe or promote a single idea. All are asked to use their imaginations and creativity and to consider the trends and issues that have been discussed. The process is generally electric as the group becomes a brain trust that gives strength to a sense that “we’re all in this together.”

*Futures Councils*, perhaps groups of 10 to 12, might meet three or four times a year, each time with a rotating or new membership. That rotation will increase overall community engagement. An aim is to simply consult with these brain trusts as part of our process for spotting trends and considering what the implication of those trends might be for the organization and community. They represent another laudable way of staying in touch.

**Gary Marx** is president of the Center for Public Outreach in Vienna, Virginia. He has spoken on six continents and written more than ten books, among them, *Twenty-One Trends for the 21<sup>st</sup> Century: Out of the Trenches and into the Future* (published by Education Week Press) and *Future-Focused Leadership* (published by ASCD). Both of these books describe these futures tools in even more detail.

**Notes, Trend Analysis**  
**Twenty-One Trends for the 21<sup>st</sup> Century**  
*Out of the Trenches...and into the Future*

**What are the implications of these trends:**

**For how we operate our schools and our education system?**

**For what all of our students need to know and be able to do for be prepared for the future in a fast-changing world? (*Consider academic knowledge, skills, behaviors, and attitudes needed for citizenship, career, job, and life.*)**

**For economic growth and development and quality of life in our communities?**

*Source: Gary Marx, President, Center for Public Outreach,  
Author, Twenty-One Trends for the 21<sup>st</sup> Century*

# ISSUE MANAGEMENT

Gary Marx

**Definition:** An issue is a trend or condition, internal or external, that may, does, or will affect the successful accomplishment of your objectives.

## **The Issue Management Process:**

1. Issues Identification
2. Analysis
3. Setting Priorities
4. Strategy Development
5. Ongoing Evaluation and Course Corrections
6. Post-mortem or Evaluation

## **Segments of an Issue Brief:**

1. A clear, brief statement of the issue.
2. The impact of the issue in some measurable terms (possibly High, Medium, or Low).
3. The probability/likelihood that the issue will have a significant impact on us. Generally on a percentage basis, as a 20 percent chance, 50 percent chance, 100 percent chance.
4. The significance of the issue for our organization: Critical, Ongoing, or Emerging.
5. The position of your organization or those positions being considered.
6. The positions of other organizations.
7. Further Issue Analysis: What does it mean to us? Why? What is the background leading to this issue? What actions have been taken to date, if any?
8. Critical follow-up dates: What will or will likely happen next and when?
9. Key contacts: Who keeps the file or records on this issue? How can I reach them?
10. Other resources and biographical references, files.

*(An issue brief, a dynamic rather than a static document, can be maintained on paper, in a computer file, or both.)*

**Gary Marx**, President, Center for Public Outreach

Author: *Twenty-One Trends for the 21<sup>st</sup> Century* (published by Education Week Press)

*Future-Focused Leadership* (published by ASCD)

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## IDENTIFYING THE ISSUES

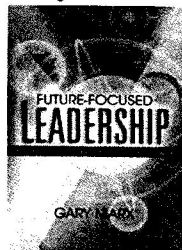
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## Qualities of Future-Focused Education and Community Leaders

What words would you use to describe a...  
Future-Focused Education/Community Leader?



## Qualities of 21st Century Leaders

- Generalist...Sees the Big Picture and Little Picture
- Creative/Imaginative
- Clarifier/Definer
- Thermometer/Thermostat
- Thoughtful Critic
- Curious, Optimistic
- Future Oriented
- Trend-Spotter and Trend-Setter
- Good Judgment
- Conceptual, Brainy
- Teacher
- Mobilizer
- Context/Perspective
- Intellectual Leader
- Implementer
- Manager
- Problem Solver
- Excited about Positive, Not Just Negative

List Compiled by Gary Marx, Author, Future-Focused Leadership

## Qualities of 21st Century Leaders

- Moderator
- Facilitator
- Genuine
- Passionate
- Active Listener
- Low-Key ↔ High-Key
- Nurturer
- Empathetic, People Skills
- Collegial
- Enjoys complexity and constant change
- Energizer
- Architect
- Planner
- Conductor
- Innovator
- Thinker
- Consultant
- Communicator
- Consensus Builder
- Engaged & Engaging

List Compiled by Gary Marx, Author, Future-Focused Leadership

Getting Connected...Staying in Touch

**We are Interpreters!**

*We need to be two-way interpreters...  
interpreting our organization to society...  
and also interpreting society to our organization.*

Presentation by Gary Marx, President, Center for Public Outreach, Vienna, Virginia, USA

Futures Tools for Engagement and Planning

## Reputation Analysis Aspirational Leadership

- Today: How would constituents or potential constituents currently describe our organization? What are we known for?
- 2018-2020: How would we like to have people describe our organization? What are the characteristics of the organization of the future? What would we like to be known for?

*Thought: Without aspirations, circumstances will drive our behavior.  
Suggestion: Hire and encourage people who have aspirations.*

Gary Marx, President, Center for Public Outreach, Vienna, Virginia, USA

Getting Connected...Staying in Touch

## Intellectual Leadership

Describe Intellectual Leaders:

- In touch with the issues.
- See things in context.
- Can explain both the big and little pictures.
- Critical thinkers.
- Creative thinkers.
- Understand the meaning of what's going on.

*We demonstrate our thoughtfulness and intellect in how we communicate and how we lead.*

Gary Marx, President, Center for Public Outreach, Vienna, Virginia

# Gap Analysis

## *Identifying Ideals and Gaps*

In brief one-sentence statements, identify what you consider up to five characteristics/ideals that describe a school or school system capable of preparing students for life in a Global Knowledge/Information Age. Use your ingenuity, creativity, and imagination. Do not consider traditional obstacles or “things that we just never discuss” in developing these statements. Concentrate on developing the statements. Then, you might want to consider how the statements you’ve developed reflect reality. A further “filling the gaps” step might involve development of a strategy that could be considered in getting us from where we are to where we might like to be.

### **Characteristic/Ideal 1:**

How would you currently rate how you’re doing in reaching or exemplifying this ideal?  
(Circle one of these numbers.) Low 1 2 3 4 5 6 7 8 9 10 High

What steps would you recommend for filling this gap?

### **Characteristic/Ideal 2:**

How would you currently rate how you’re doing in reaching or exemplifying this ideal?  
(Circle one of these numbers.) Low 1 2 3 4 5 6 7 8 9 10 High

What steps would you recommend for filling this gap?

### **Characteristic/Ideal 3:**

How would you currently rate how you’re doing in reaching or exemplifying this ideal?  
(Circle one of these numbers.) Low 1 2 3 4 5 6 7 8 9 10 High

What steps would you recommend for filling this gap?

### **Characteristic/Ideal 4:**

How would you currently rate how you’re doing in reaching or exemplifying this ideal?  
(Circle one of these numbers.) Low 1 2 3 4 5 6 7 8 9 10 High

What steps would you recommend for filling this gap?

### **Characteristic/Ideal 5:**

How would you currently rate how you’re doing in reaching or exemplifying this ideal?  
(Circle one of these numbers.) Low 1 2 3 4 5 6 7 8 9 10 High

What steps would you recommend for filling this gap?

*Source: Gary Marx, President, Center for Public Outreach, Vienna, Virginia, USA.  
Author of Twenty-One Trends for the 21<sup>st</sup> Century*