



Center for Leadership & Educational Equity

Future Protocol a.k.a. Back to the Future

Developed by Scott Murphy August, 2002 and revised June, 2008.

Overview

An effective time to use this strategy is in the early stages of creating any plan or project that will ultimately have an endpoint (e.g. visioning, strategic planning). Ideas should be formulated and considered, but not yet formalized. If they are formalized, other review and refinement structures like a Tuning Protocol could be considered.

What are the goals and purposes of this process?

- Expand and clarify vision of what a group, team, or organization is trying to achieve
- Identify opportunities and avenues for strategic planning
- Guide purposeful actions that consider challenges, timeline, resources, and outcomes
- Increase likelihood that vision becomes reality

What will it achieve?

If taken fully to completion, your team will gain:

- A clear, agreed-upon understanding of your vision,
- A set of actions that will bridge the current reality to the new vision,
- A consideration of the potential obstacles that might create challenges,
- A prioritized plan of action that is directly aligned with your intended outcome.

Further, your team will be working to view positively what is possible and to think strategically about how to make the vision a reality.

What are some considerations in implementing this strategy?

- It may be initiated by a group or by a lead individual.
- Members of the group should have similar context and investment in the work being done.
- Considers, but does not focus on obstacles and, as a result, stays positive and energizing.
- Documentation at each step is key to turning ideas into tangible actions.
- It benefits from a skilled facilitator who will guide the process and not influence outcome.

How much time is needed?

- Depending on the size of the group and magnitude of the plan, 2 hours to several days
- May be stretched out from a one-time experience to continued series of engagements

What materials are needed?

- Graphic organizers (or just notepaper) for participants' thinking
- Poster papers to represent group thinking and different steps in visioning process



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Time

Depending on the size of the group and the focus, time required for the protocol may vary from 60 minutes to 2 hours or more. Facilitator judges the amount of time needed for process as well as each step to meet needs of group.

Process

1. Overview

Facilitator overviews process with team of participants. The duration and expected process outcomes are clarified. Materials are distributed and explained. (5-10 minutes)

2. Presentation

A lead member of the group describes what the team is trying to accomplish, as well as the hopes, expectations, and parameters being considered in vision or strategic plan.

3. Clarifying and Probing Questions

The group asks clarifying and probing questions of the lead member. The clarifying questions are intended to help the team of participants to best understand its task and the kind of visioning it is expected to do. The probing questions are intended mediate and extend the lead member's thinking around their own hopes, expectations and parameters for a future vision for the team. (*Facilitator Note: The round of probing questions can be optional if time is short.*)

Facilitator Note: The following begins the main part of the protocol. It is best facilitated if you have 3 posters already set up representing the 3 time-frames of the protocol (projected future, beginning past, and time that connects the 2). Also, it is advisable to have someone other than facilitator do the writing on the posters so you can focus on the team members' ideas.

4. Project into the future and thoroughly describe what it looks, sounds, and feels like having accomplished your goals and vision.

- Must speak in **present tense** as this has already happened
- Describe **what is** in this best case projection. This is not a hope or a wish, this is a description of what is currently in place in your *projected future*.
- Do not yet describe how it has happened.
- Focus on tangible things you see, hear, feel, and you know to be true having accomplished this vision.

Examples:

- Teacher engagement with students in the classroom
- Student achievement data for students of color and poverty
- Collaborative programs involving school-based leadership and community
- You might consider revisiting this *projected future* after each of the Steps 5 and 6, as well.

*Facilitator Tips: Remember, you are IN the time of the **projected future** for Steps 4, 5, and 6, so help the team engage and speak as if they are in the time period.*

- 5. Look “back”** from your projected future and describe how it looked when you started.
- Must speak in **past tense** as this was what was in place when you first envisioned your future”.
 - Speak to all aspects, including both the positives and the challenges that were part of the school, community, or organization at that time.
 - Try to remain as concrete and explicit as possible on aspects like culture, achievement, conversations, organizational structures, challenging issues, etc.

Facilitator Tips: It is good for the facilitator to sometimes ask clarifying questions when writing things on the poster, which helps participant avoid generalities and be more specific and clear. You can also have the group identify priorities to focus their efforts in the next step.

- 6. Connect** the *projected future* to the past by explicitly answering “how” you moved your organization from the past to the projected future.
- Must speak in **past tense** as this represents the time period from the past to this *projected future*.
 - Directly and explicitly connect the 2 periods of time with things that were done to make the future happen.
 - Consider discussing and charting *how, what, when, with what resources, and by whom* when listing how the future was accomplished.

*Facilitator Tips: If the comments are very general, you might ask them to be more specific as to **what** was done and **how** it impacted the change to the projected future. “So what specifically did we do that helped us close that gap?” or “How did that help us communicate better with parents?”*

- 7. Identify the challenges** and obstacles that had to be overcome to achieve your projected future.
- On cards or sticky notes, have team members write down some of the most pertinent challenges that existed in accomplishing this vision.
 - Be honest and as specific as possible.
 - Place cards between the posters of the *projected future* and the posters for how you got there. Leave space between the cards to visually represent gaps that allow for the team to thoughtfully maneuver through the obstacles.

8. Debrief the process and speak about **next steps***

- * The next steps are absolutely crucial in moving your vision from a set of ideas to a series of strategic actions. Most teams take the “how” posters and go through a prioritization process and then develop an action plan for the top priority items. Those items are benchmarked with dates, those responsible for the actions, and intended outcomes of those actions, which are connected to the projected future.