

NAST

Sourcebook for Futures Planning

Supplement I

SOURCEBOOK
for
FUTURES PLANNING

SUPPLEMENT I

NATIONAL ASSOCIATION OF SCHOOLS OF THEATRE

SOURCEBOOK
for
FUTURES PLANNING

SUPPLEMENT I

NATIONAL ASSOCIATION OF SCHOOLS OF THEATRE

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**NATIONAL ASSOCIATION OF SCHOOLS OF THEATRE
11250 Roger Bacon Drive, Suite 21
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SOURCEBOOK FOR FUTURES PLANNING

SUPPLEMENT I

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INTRODUCTION

This Supplement to the NAST *Sourcebook for Futures Planning*, 1991 Edition, focuses on one additional technique for futures work and provides examples of ways in which elements in the *Sourcebook* may be combined to address specific problems. Users will need a copy of the *Sourcebook* in order to work with *Supplement I*.

ANALYTICAL PATH METHOD

To study the future is to confront an enormous and complex set of interrelated issues and problems. The Analytical Path Method assists in the rapid formation of analytical designs, and thus provides a means for acquiring perspective on and control of a specific number of factors. Each design can then be pursued to the extent the user wishes. The method is particularly useful in developing models, scenarios, simulations, and systems analysis.

The Analytical Path Method involves six basic operations:

1. Gather in one place the categories of conditions, issues, values, and techniques that will be considered for use in developing your various analytical designs.
2. Define the nature of the specific issue to be addressed. For example, is the intent to determine current status, to determine trends, to research options, or to reach futures decisions?
3. Determine the program, activity, or entity that will be either the subject of the study, or the subject to which the results of the study can be addressed.
4. Devise a means of working with the collection of conditions, issues, and values that allows quick, symbolic work in the rapid formation of analytical paths.
5. Organize any or all the conditions, issues, and values into analytical patterns that achieve the objectives of your study.
6. Determine the size, scope, and intensity of your idea and information gathering, and the amount of time you plan to spend.

The following pages provide the outline of one possible construct of the Analytical Path Method. This sample analytical path process features work with many of the conditions, issues, values, and techniques covered in the *Sourcebook*. As the sample is played out, it should become obvious how *Sourcebook* content covering trends, tests, and other patterns can be used to carry out an analytical path design.



Caution

It is possible to get carried away with creating analytical paths for their own sake. As enjoyable as this may be, the practical purpose is to design a path to reach a certain analytical or operational goal.



Keep Going

Do not let the potential complexity or the look of the *Sourcebook Supplement* presentation of the sample process convince you at a glance that this section is too difficult. The concept is simple and full of rewards for those who work with it, even in its most basic applications.

A SAMPLE ANALYTICAL PATH PROCESS

CONDITIONS, ISSUES, VALUES

(For this sample only. Many other configurations are possible.)

- A. Element of Field (Performance, Theatre Education, etc.)
- B. Elements of Field (The Field as a Whole or Any Combination of Elements)
- C. Current Values in Field – Common Practices
- D. Projected Values in Field – Major Trends (Major Themes as Indicators)
- E. Status of Change Factors
- F. Projections for Change Factors
- G. Status of Change Mechanisms
- H. Projections for Change Mechanisms
- J. Public Constituency Values
 - 1. General Population (Current)
 - 2. Intelligentsia/Professionals (Current)
 - 3. Policy Makers (Current)
 - 4. General Population (Projected)
 - 5. Intelligentsia/Professionals (Projected)
 - 6. Policy Makers (Projected)
- K. Objectives
- L. Size/Scope
- M. Resources
- N. Strategies
- P. Content

Symbology

In this sample, “§” is used to symbolize interrelationships. Thus, A § E means the interrelationship of an element of the field with the status of change factors. In practice, this would involve taking playwriting, for example, and working out the interrelationships with economics, demographics, technology, etc.

“§” after a series means interrelationships of all units in the series. Thus, (J.1.J.2.J.3.§) means the interrelationships of current values among the general population, intelligentsia/professionals, and policy makers.



Take Note

No mathematical relationships are implied by the use of this or any other symbology in this sample analytical path process.

MATERIALS USED IN THE SAMPLE ANALYTICAL PATH PROCESS

Units for Developing Analytical Paths

- A. Element of Field (Performance, Theatre Education, etc.)
- B. Elements of Field (The Field as a Whole or Any Combination of Elements)
- C. Current Values in Field – Common Practices
- D. Projected Values in Field – Major Trends (Major Themes as Indicators)
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 - 3. Policy Makers (Current)
 - 4. General Population (Projected)
 - 5. Intelligentsia/Professionals (Projected)
 - 6. Policy Makers (Projected)
- K. Objectives
- L. Size/Scope
- M. Resources
- N. Strategies
- O. Content

Elements of the Field

Performance
Education/Pedagogy
Research
Scholarship
Criticism
Policy Studies
Multidisciplinary/Interdisciplinary
Popular Culture
Theatre Industry
Support Systems

- Public
- Private
- Profit
- Not-for-Profit

Change Factors

Ideas/Values
Information
Knowledge
Economic Conditions
Technology
Demographics
Political Climate
Religious Climate
Intellectual Climate
Cultural Climate
Governance Patterns in Education and Culture
Presence, Will, and Commitment of Visionaries
Wild Cards/Arts
Wild Cards/Education
Wild Cards/General

Change Mechanisms

Funding Patterns
Reward Systems
Legislation/Regulation
Governance/Administrative Systems
Standards-Setting Mechanisms
Policy Analysis/Development Mechanisms
Consultant/Advisory Systems
Industry Decisions
Technological Applications
Advertising
Publications/Studies/Research Reports
Content Presented by Electronic Media
Content of Formal Education
Pathbreaking Conceptual Work in the Field

Strategies

Preservationist
Conservationist
Reaction
Pragmatic
Experimental
Policy Advancement
Speculative

**A SAMPLE ANALYTICAL PATH PROCESS:
TO DETERMINE CURRENT STATUS**

ANALYTICAL PATH EXAMPLES

A § B	Conditions of one element of the field compared with the others. Example: performance, education, research, interdisciplinary scholarship, etc. Comparison may be on any basis.
A § C	An element of the field compared with current values in the field.
B § C	The relationships between elements of the field and values of the field.
A § E	An element of the field compared with the status of the change factors.
B § E	The field as a whole compared with the status of change factors.
(A § B) § C	How an element of the field relates to the field as a whole and how this result relates to current values in the field.
(A § B) § E	How an element of the field relates to the field as a whole and how this result relates to the status of change factors.
(A § B) § (C § E)	Relationships between an analysis of element/elements of the field and an analysis of current values/status of change factors.
[(A § B) § (C § E)] § J.1.	Compares the immediately preceding analysis with the values held by the general population.
K § N	Compares objectives and strategies of the entity being considered.
[(K § N) § (L § M)] § A	Relationships between an analysis of objectives/strategies and an analysis of size-scope/resources, compared with an element of the field. Particularly useful in reviewing present curricular programs.
[B § (C § E)] § [(K.N.P.§) (L § M)] § J.3.	The field is compared against a current values/status of change factors relationship. This result is compared with the results of another comparison: the interrelationship of objectives, strategies, and content compared against the size-scope/resources relationship. This complete result is compared with the current values of policy makers concerned with the entity in question.
Etc.	

MATERIALS USED IN THE SAMPLE ANALYTICAL PATH PROCESS

Units for Developing Analytical Paths

- A. Element of Field (Performance, Theatre Education, etc.)
 - B. Elements of Field (The Field as a Whole or Any Combination of Elements)
 - C. Current Values in Field – Common Practices
 - D. Projected Values in Field – Major Trends (Major Themes as Indicators)
 - E. Status of Change Factors
 - F. Projections for Change Factors
 - G. Status of Change Mechanisms
 - H. Projections for Change Mechanisms
 - J. Public Constituency Values
 - 1. General Population (Current)
 - 2. Intelligentsia/Professionals (Current)
 - 3. Policy Makers (Current)
 - K. Objectives
 - L. Size/Scope
 - M. Resources
 - N. Strategies
 - O. Content
- 4. General Population (Projected)
 - 5. Intelligentsia/Professionals (Projected)
 - 6. Policy Makers (Projected)

Elements of the Field

Performance
Education/Pedagogy
Research
Scholarship
Criticism
Policy Studies
Multidisciplinary/Interdisciplinary
Popular Culture
Theatre Industry
Support Systems

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- Private
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Political Climate
Religious Climate
Intellectual Climate
Cultural Climate
Governance Patterns in Education and Culture
Presence, Will, and Commitment of Visionaries
Wild Cards/Arts
Wild Cards/Education
Wild Cards/General

Change Mechanisms

Funding Patterns
Reward Systems
Legislation/Regulation
Governance/Administrative Systems
Standards-Setting Mechanisms
Policy Analysis/Development Mechanisms
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**A SAMPLE ANALYTICAL PATH PROCESS:
TO DETERMINE TRENDS**

ANALYTICAL PATH EXAMPLES

A § D

Conditions of one element of the field compared with projected values in the field - use trend analysis to find D.

C § D

Examples continue same pattern as previous chart.

C § H

D § M

(A § B) § D

(A § D) § F

B § H

(B § H) § J.6

(K § C) § D

[(K § M) § L] § D

[(K § M) § L] § F

[(K § M) § L] § (D § F)
§
H

[(A § B) § C § F] § H
§
J.5.

[(A.B.D.F.H.§) § (K.L.M.N.P.§) § J.5.
§
J.6.

Compares conditions in theatre, conditions at the institution, projected values of the intelligentsia, all against projected values of policy makers. This is a relatively simple analytical path for projecting how trends in theatre will be understood for action planning purposes.

(C § H) § (J.1.J.2.J.3.§)
§
(J.4.J.5.J.6.§)

Compares the influences of change mechanisms on current values in the field, and then plays the result against current and projected constituency values. Useful in planning presentation and community education activities.

Etc.



Remember

No mathematical relationships are implied by symbology used in these examples.



More Ideas

A relatively simple way to gather information for making reasonable projections is to keep a clippings file of futures issues. This is particularly helpful for D, H, and J.4, 5, 6.

MATERIALS USED IN THE SAMPLE ANALYTICAL PATH PROCESS

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 - O. Content
- 4. General Population (Projected)
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**A SAMPLE ANALYTICAL PATH PROCESS:
TO RESEARCH OPTIONS**

ANALYTICAL PATH EXAMPLES

A § N

Conditions of one element of the field analyzed against strategic conditions and strategic possibilities.

K § N

Examples continue same pattern as previous chart.

(A § B) § N

M § (K § P) § (J.3. § J.6.)

K § (A.B.C.D.§)

(K § A) § (D.F.H.§)

$$\left[\begin{array}{c} (K \text{ § } B) \text{ § } M \\ \text{§} \\ (D.F.H.\text{§}) \end{array} \right] \text{ § } (J.1.J.2.J.3.\text{§}) \text{ § } N$$

Objectives compared with conditions in applicable elements of the field, compared against values. A summary of this is studied against projected values in the field, projections for change factors, and projections for change mechanisms. The result is compared against current constituency values. The entire picture is then reviewed against strategic possibilities.

See: *Strategies Profiles*

Etc.



Remember

Once options are developed, they can be subjected to various *Tests*. See *Sourcebook, Part II.C.*

MATERIALS USED IN THE SAMPLE ANALYTICAL PATH PROCESS

Units for Developing Analytical Paths

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Speculative

**A SAMPLE ANALYTICAL PATH PROCESS:
TO MAKE FUTURES DECISIONS**

ANALYTICAL PATH EXAMPLES

A § N

Interrelationship of conditions in one element of the field and any strategy or profile of strategies.

Examples continue same pattern as previous chart.

B § N

K § N

D § K § N

$$\left[\begin{array}{c} \underline{(A.C.D.§) § (E.F.G.H.§)} \\ § \\ (J.6.) \end{array} \right] § N$$

Looks at an element of the field against current/projected values of the field, this against change factors and change mechanisms. The summary is analyzed against the projected values of decision makers. All are then considered against a specific strategy or profile of strategies.

$$\left[\begin{array}{c} \underline{K § (B.C.D.§) § (F § H)} \\ § \\ (L.M.N.P.§) \end{array} \right] § (J.1.J.2.J.3.§) § N$$

Information about objectives compared with elements of the field are projected, summary compared with size/scope, resources, strategies, content. All are compared against current constituency values. This summary is then reviewed against any specific strategy or profile of strategies.

Etc.



Take Note

In this sample process, making analytical paths to research options and to make futures decisions differ only in intent concerning use. With options, the intent is speculative, with futures decisions, the intent is a specific action.

Once decisions are made, they can be subjected to various analyses.

USING COMBINATIONS OF MATERIALS AND IDEAS IN THE SOURCEBOOK AND SUPPLEMENT I

The ideas and techniques presented in the *Sourcebook* and in *Supplement I* may be combined in an infinite variety of ways. This section includes a summary of the *Sourcebook* and *Supplement I* followed by four examples showing combinations of techniques.



Remember

When developing your own combinations of ideas and materials, do not make your analysis more complicated than necessary to the task.



More Ideas

A good framework for keeping complex situations in order is to use five basic questions as planning guidelines:

- What is now?
- What will be?
- What do you want to do?
- What *can* you do?
- How do you do it?

SUMMARY OF MATERIALS AND IDEAS PRESENTED IN THE SOURCEBOOK AND SUPPLEMENT I

The following overview is provided to assist creative use of *Sourcebook* and *Supplement I* materials.

- *Values*
- *Scope, Depth, Intensity of Analysis and Planning*
- *"What Changes/What Does Not" Distinctions*
- *"Change Before/After the Fact" Distinctions*
- *Common and Specific Futures Distinctions*
- *Time Frame*
- *Current, Prospective, or Speculative Conditions*
- *Basic Goals of Theatre Units*
 - Curricula
 - Competencies
 - Opportunities
 - Community Service
 - Resource Management
- *Elements of the Field*
 - Performance
 - Education/Pedagogy
 - Research
 - Scholarship
 - Criticism
 - Policy Studies
 - Multidisciplinary/Interdisciplinary
 - Popular Culture
 - Theatre Industry
 - Support Systems
- *Change Factors*
 - Ideas/Values
 - Information
 - Knowledge
 - Economic Conditions
 - Technology
 - Demographics
 - Political Climate
 - Religious Climate
 - Cultural Climate
 - Governance Patterns in Education and Culture
 - Presence, Will, and Commitment of Visionaries
- *Change Mechanisms*
 - Funding Patterns
 - Reward Systems
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 - Content of Formal Education
 - Pathbreaking Conceptual Work in the Field
- *Constituency Analysis*
- *Profiles*
- *Strategies*
 - Preservationist
 - Conservationist
 - Reaction
 - Pragmatic
 - Experimental
 - Policy Advancement
 - Speculative
- *Trends*
- *Trend/Issues Analysis*
- *Trends/Issues Impact Analysis*
- *Turning Point Analysis*
- *Values Test I*

Assesses the impact of current or prospective ideas, information, proposals, events, trends, issues, or problems on the values, priorities, and interests of the theatre unit.
- *Values Test II*

Measures artistic, educational and other values such as these apply to current or prospective curricula, programs, and activities.
- *Priorities Test*

Examines the impact on current priorities of a proposed change in policies, programs, or activities.

Don't forget "wild cards."

- *Program Mix Test*
Measures the influence of a particular current or prospective curricular program or related activity on the total curricular offerings of the theatre unit.
- *Goals/Objectives and Action Plans Correlation Test*
Estimates the extent to which a given operating policy or action plan actually supports the achievement of the theatre unit's goals and objectives.
- *Resolve Test*
Measures the will and determination of involved personnel with regard to a program or activity under consideration.
- *Risk Test*
Defines and assesses potential loss or disadvantage to the theatre unit as a consequence of change.
- *Trend Impact Test*
Estimates the impact of national, regional, statewide, or local trends on the programs of the theatre unit.
- *Strategic Orientation Test*
Determines whether the theatre unit has the appropriate strategic orientation to accomplish a given change in program, procedure, or policy.
- *Ability to Influence Test*
Assesses the extent to which the theatre unit can influence issues, factors, or individuals that may affect its future.
- *Opportunity Prospect Test*
Determines the extent to which the theatre unit is prepared to take advantage of a given opportunity that may require change.
- *Six Phase Planning Process*
 - Assessment of External Environment/Internal Organization
 - Strategic Direction (Mission, Goals, Objectives, etc.)
 - Base and Contingency Plans
 - Implementation of Policy/Strategy Program
 - Results - Performance Evaluation
 - Internal Organization Assessment
- *Twelve Point Outline for Action Planning*
Consider:
 1. current mission, goals, objectives, and operational policies;
 2. environment and resources of the institution, including program strengths and weaknesses;
 3. trends and critical issues to be faced by the unit and/or institution;
 4. projected opportunities and obstacles.

Determine:

5. priorities for action;
6. assessment of projected action(s);
7. planning procedure: questions, time frame, process;
8. action plans.

Examine:

9. consistency among mission, goals, objectives, action plans;
10. potential conflicts with existing or projected programs or conditions;
11. resource requirements, availability, and continuity;
12. prospects for short-term/long-term success.

- *Overview Analysis*

Mission Assessment:

Compares appropriateness/consistency of mission and environmental and resource factors.

Goal Assessment:

Compares a goal with environmental and resource factors, and with mission to reach a summary conclusion about the significance of an environmental or resource factor in achieving the goal. The analysis provides the basis for an overall conclusion.

Objective Assessment:

Compares an objective with environmental and resource factors, and with goals and mission to reach a summary conclusion about the significance of an environmental or resource factor in achieving the objective. The analysis provides the basis for an overall conclusion.

Action Plan Assessment:

Compares an action plan with environmental and resource factors, and with objectives, goals, and mission to reach a summary conclusion about the significance of an environmental or resource factor in carrying out the action plan. The analysis provides the basis for an overall conclusion.

Status/Time Assessment:

Provides quick overview of evidence about environmental and resource factors that have an impact on a specific program, activity, or entity. Improvement, status quo, and deterioration are in terms of the impact of that factor on the program activity or entity.

Options Review:

Compares the attributes of a specific option decision against environmental and resource factors present in a given entity. Following the analysis, it is possible to see what changes would be necessary for the option to succeed or fail, then run each of these possibilities through the same analysis.

- *Analytical Path Method*

- Determine Current Status
- Determine Trends
- Research Options
- Make Futures Decisions

EXAMPLE 1: TRENDS/PROGRAMS/ACTION PLANS ANALYSIS

Provides one possible flow chart for studying the relationships among trends, programs, and action plans; helpful in establishing priorities for new program needs or directions.

Determine:

1. Programmatic Scope

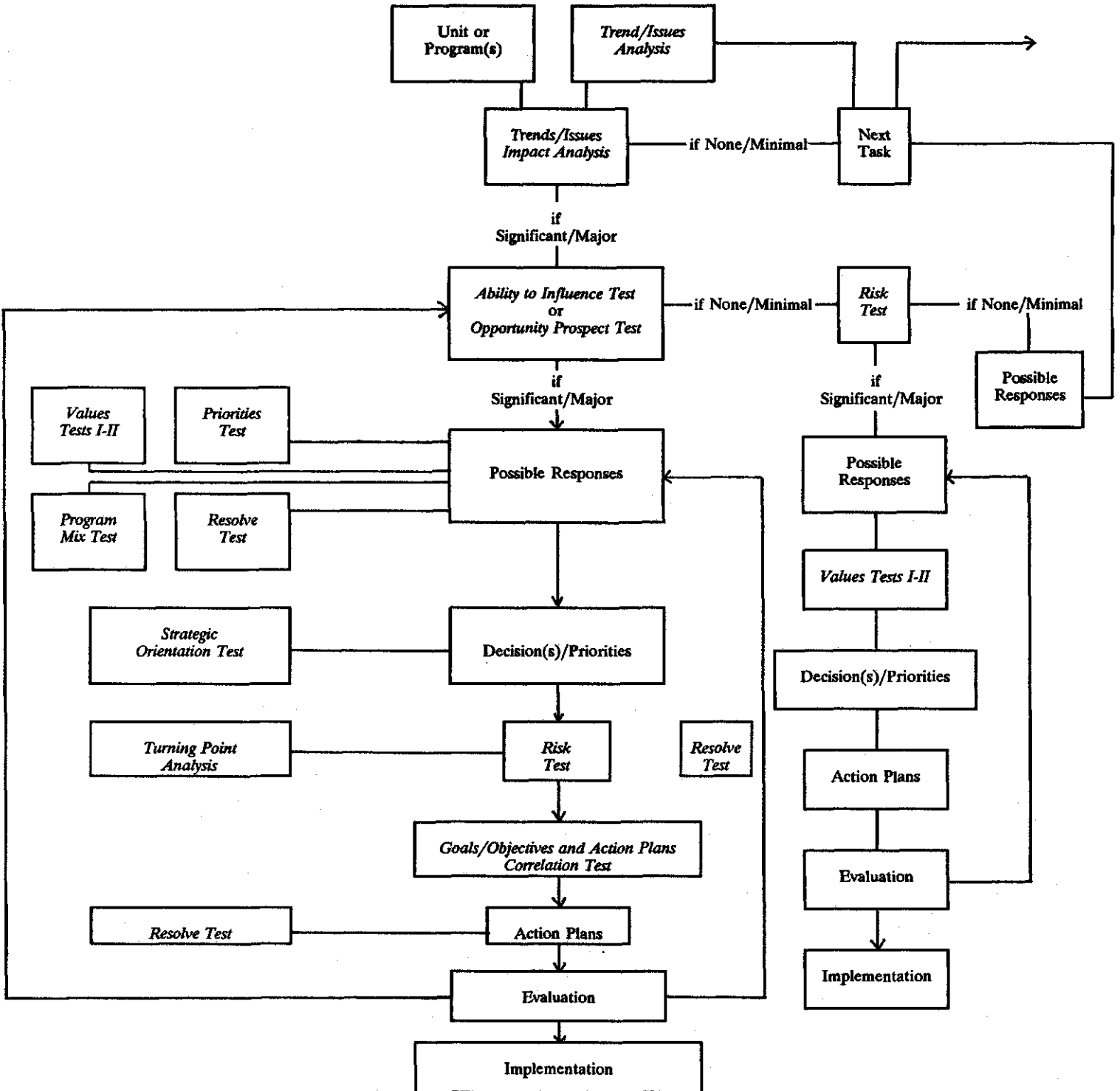
- Theatre Unit
- Programs
- One Program

2. Trend Scope

- Set of Trends
- One Trend

3. Analysis Type

- Current
- Projective
- Speculative



EXAMPLE 2: CURRICULUM ANALYSIS

To determine the viability of a proposed curricular program.

Consider:

1. Use *Analytical Path Method* to determine the current status of the field of the proposed program in the theatre community as a whole.

A § (B § C)

2. Use *Trends/Issues Impact Analysis* to search for large trends in the theatre community and elsewhere that may have an impact on the proposed program.

Then:

Use *Analytical Path Method* to create a trends/issues impact analysis for specific applications to the program.

A § (D., F., H. §)
(J.4., J.5., J.6. §)

Determine:

3. Use the *Twelve Point Outline for Action Planning* to develop the proposed curriculum and its supporting mechanisms.

Examine:

4. Use *Overview Analysis (Action Plan Assessment)* to determine the viability of the plan in terms of overall environment and resources.
5. Use the following tests to determine the viability of the prospective program in the theatre unit:

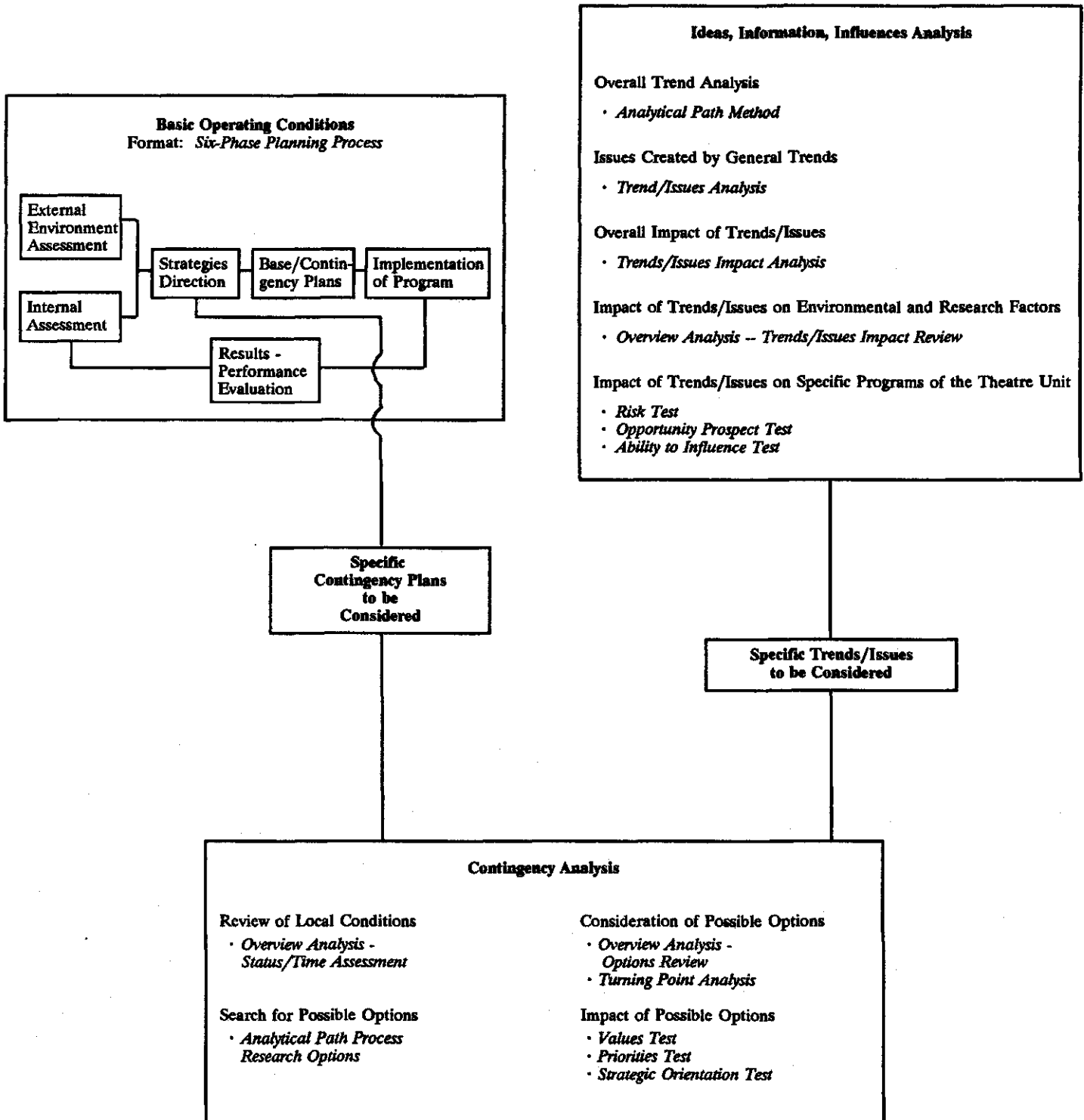
Values II
Priorities
Program Mix
Resolve
Strategic Orientation
Risk

At this point, the user should have a good set of ideas and information about the prospects of the new curriculum and, if still planning to proceed, be able to move prudently to such questions as:

- a. Strategies for implementing the program.
- b. Contingencies for potential adversities.
- c. Identification of conditions and timelines for make-or-break variables.
- d. Etc.

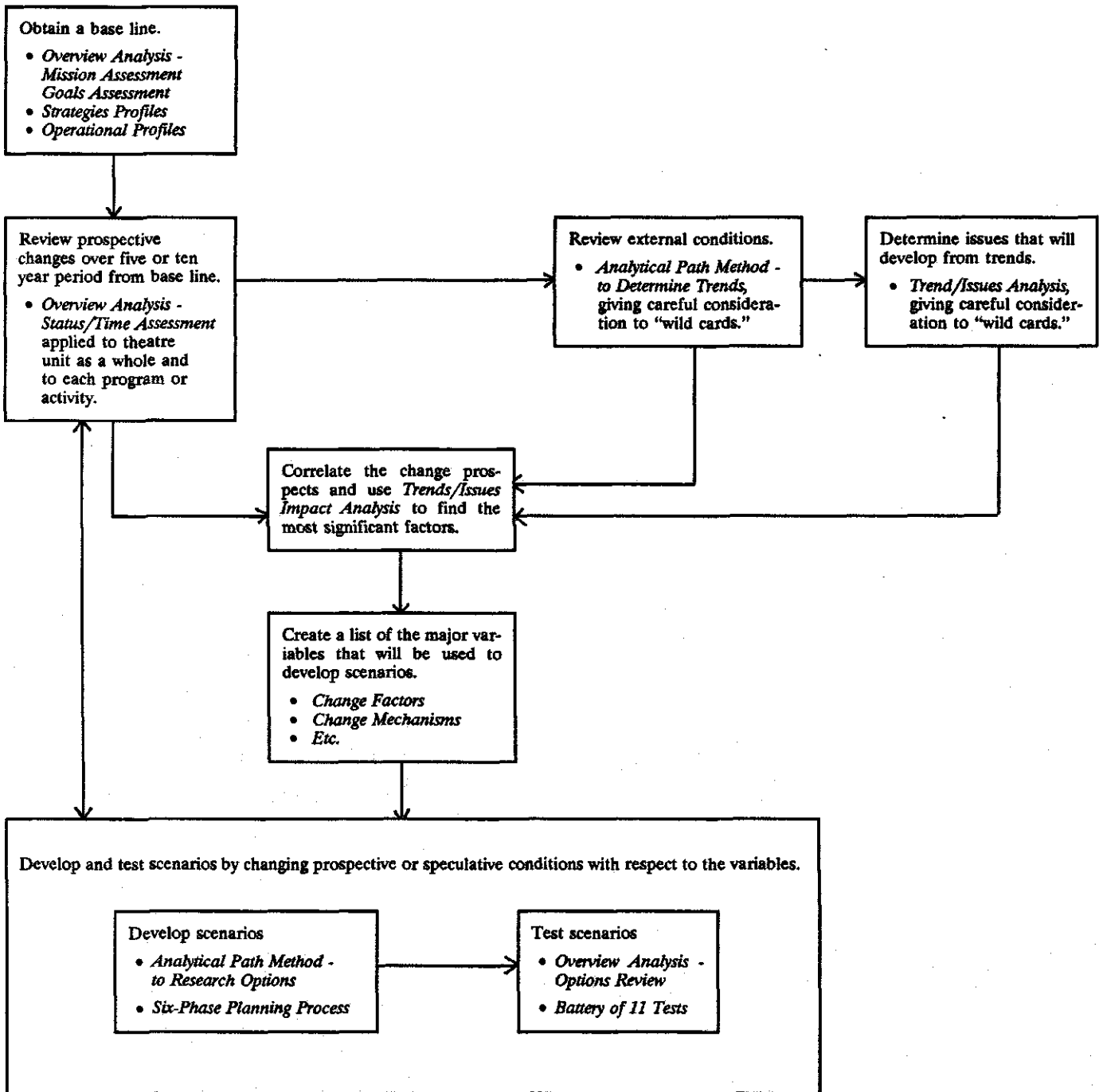
EXAMPLE 3: INFLUENCES ON BASIC OPERATIONS

To develop a mechanism for continuous analysis, monitoring and adjustment of basic operations with focus on new ideas, information, and influences.



EXAMPLE 4: FUTURES SCENARIOS

To develop and test scenarios about the five - ten year future of a theatre unit in order to project the prospects for change under different sets of conditions.



NOTES AND SOURCES

NOTES

A number of NAST publications have utility in futures planning:

- NAST *Handbook* – published every two years.
- NAST Self-Study Format – published every five years in *Procedures for Institutional Membership*.
- Assessment documents for graduate and undergraduate programs providing lists of basic questions for reviewing wholes and parts of curricular offerings.
- *Executive Summaries* on futures issues published periodically.

SOURCES

The following list concentrates on works devoted to planning. It is not exhaustive. For texts concerned with specific issues such as demographics, technology, etc., see NAST *Executive Summaries* on these topics, published 1990-1992.

Bryson, John M. *Strategic Planning for Public and Nonprofit Organizations: A Guide to Strengthening and Sustaining Organizational Achievement*. San Francisco: Jossey-Bass Publishers, 1988.

Clarkson, Albert. *Toward Effective Strategic Analysis: New Applications of Information Technology*. Boulder, Colorado: Westview Press, 1981.

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