Future Pathways: Using Futures Methods for Personal Strategic Learning

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Just as organizations use strategic planning to prepare for the future, individuals and the organization can benefit from personal strategic plans that consider future pathways within the organization as part of those plans. This research proposes a three-step approach to creating personal strategic plans that incorporates personal research, personal scenario development and creation of a personal vision of the future as the basis for a strategic plan for the next stage of life.

Key words: Future Pathways, Careers, Personal Strategic Learning and Planning

While the term career was once associated with the construction of a 'well-made road' (Sennett, 1998, p.120) along which individual desires for status and fulfillment could be reached within organizations, in recent years it has been suggested that for many, such notions can no longer apply and few organizations would now claim to offer careers for life (CIPD, 2003). Instead, individuals are required to take more responsibility for developing their own careers through their working lives and beyond, embracing such notions as the boundary-less career and portfolio working (Fenwick, 2003). Mainiero and Sullivan (2005) argue that women have for many years interrupted their careers or opted-out of traditional progression routes in careers, employing a more relational approach to career decisions, better explained by the idea of career as a kaleidoscope. Against such moves, individuals need to develop the skills of career learning and yet there is little evidence of this happening (Mallon and Walton, 2005) and most people still see their careers in terms relating to their employment within their organizations or previous organizations. It seems that meanings of careers are organizationally situated and this affects what is deemed relevant to learn. There is a significant gap between the meaning and understandings of careers and the experience of the necessity to manage careers and learn about personal futures, whether at work or not.

This paper discusses and explains personal futures. The emphasis is on how individuals can learn about, plan for and benefit from applying futures methods to their lives. We believe that the practice of personal futures offers significant benefit to organizations in terms of career learning. The research that underlies this paper explores practical approaches to applying the methods of Foresight and Futures Studies to the lives of individuals. The results reveal something about the 'common areas' of life including the biological and psychological life changes, the underlying forces that drive individual lives and the life events that impact or change the direction of an individual's life. These are the changes, forces and events that are in people's lives outside the workplace, yet can become the driving forces that alter career paths.

Personal Futures

Extensive research has been conducted in the application of Foresight and Futures studies concepts to the real world. For example, research into global futures has been conducted by several individuals (Kahn, 1979;Meadows et al., 1992; as well as non-governmental organizations, futures oriented organizations (Club of Rome, Rand, SRI) and others (UN, Millennium Project, World Resources Institute). These organizations have explored diverse futures including sustainability of the planet, health, aging, poverty and other major issues. In addition, many nations have agencies or departments within their governments that consider alternative futures and impacts of those futures upon that country (Netherlands, Finland, United Kingdom, European Community). In some cases governmental branches have conducted or underwritten futures research such as the *Roadmap for National Security* (Hart et al., 2001) or individual members of governmental branches such as legislatures may retain futurists on their staffs or as consultants. Of course, many large businesses have internal organizations that conduct strategic planning or specific research into the future. Other businesses large and small may retain the services of consulting futurists. Consulting futurists may conduct research or offer guidance to individual companies or provide regular bulletins to their clients. However, although futures theory and methods have been demonstrated to be useful to international and national bodies and organizations; helping them to understand possible futures as well as plan and prepare for those futures; those same theories and methods have not been made available in a usable or practical form to benefit individuals.

The research reported in this paper addresses this apparent gap by assuming that the complexity of preparing a study of an individual's future is a primary barrier to the study of personal futures, and sought to reduce that complexity.

What we refer to as Personal Futures is about how existing futures methods including scenario development, visioning and strategic planning can be applied to individual lives. Yet it is critical to understand that the Personal Futures system discussed here does not include coaching or interventions in people's lives. This method simply helps people apply futures methods to their own lives. The research question we posed is: How can we reduce the complexity of the futuring process for personal futures to the point where it is both feasible and economic to conduct futures research for individuals?

To complete this study, we employ a three-step process commonly followed by professional futurists in developing strategic plans for their clients or organizations. The three steps include

- Research into the organizations history, current state and the forces affecting the present and the future.
- Development of scenarios or plausible alternative futures (De Jouvenal, 1967; Schwartz, 1991) that the organization might face, based on the research
- Development of a strategic plan (Mintzberg, 1994) based on the research and the scenarios, usually including a vision of the organizations preferred future, action plans for achieving that future and contingency plans to deal with low probability, high impact events.

We propose a similar three-step process for personal futures, utilizing information based on life stages, personal domains and life events as described above to structure their personal research.

For the individual conducting personal research preparatory to developing a strategic plan, the stages of life offer time frames for planning, indicate normal changes in life and suggest images of the future. The personal domains identify forces and sub-forces in life that bring about change. The study of life events is based on studying the common experiences of others who have who have lived though those same experiences. As Cornish (2004) suggests "Learn from your predecessors" (p. 7). Common life events suggest some of the high probability high impact events that can be anticipated in one's life.

These three elements provide a framework or structure to the personal research process that organizes and simplifies personal research. To complete the personal research, individuals explore their personal plans, desires and goals and define their personal values.

Methodology and Methods

The methodology employed in this research was grounded theory (Glaser and Strauss, 1967), and the methods that provided data included surveys, interviews, case studies, focus groups, participant observation and document study. Grounded theory has been both assailed as "a return to 'Baconian' inductivism" as well as acclaimed as "the most comprehensive qualitative research methodology available" (Haig, 1995, p.1). Glaser and Strauss (1967)¹ argued persuasively for the methodology, stating that most importantly "it works—provides us with relevant predictions, explanations, interpretations and applications" (p.i). Glaser and Strauss argued further that: "Theory based on data can usually not be completely refuted by more data or replaced by another theory. Since it is too intimately linked to the data, it is destined to last despite its inevitable modification and reformation" (p. 4).

In this research, each research method provided substantial data for comparison and categorization within the individual method and with the data collected in the other methods. The survey frame that was the foundation for this research was the membership of Seniors' Choice, an organization for senior citizens affiliated with the Valley Baptist Medical Center in Harlingen, Texas. This group was selected for their age, over sixty, and for convenience. In addition to the surveys this group also was the source of interviews and case histories. Later in the research the interviews were extended to encompass other age groups. The research began with an interest in life stages and the surveys aimed at learning more about life in the stage that Erickson (1959) termed "Old age." Some of the most revealing responses in the surveys were to open ended questions. For example, two questions asked respondents to list the "best" events and the "worst" events that had occurred in their lives since age sixty.

Similarly, unstructured, unrecorded interviews with minimal guidance provided very rich information (Glaser and Strauss, 1967). For example, an interview might start with a question, "How has your life changed since retirement?" Because of the important relationship of healthcare to personal futures, a number of healthcare professionals were interviewed. A typical question for these professionals was, "What important changes do you see in your field over the next ten years?"

¹ The 1967 book was subsequently updated and supplemented by both authors, writing separately but beginning a debate which created a substantial body of work supporting grounded theory as a qualitative methodology.

This paper also refers to "futures methods" (Glenn and Gordon, 2003; Bell, 1997) or the methods of foresight and futures studies as methods used to explore or prepare for the future. Methods commonly associated with foresight and futures studies include Delphi research, trend impact analysis, scenario development, visioning, strategic planning, environmental scanning as well as other methods and techniques.

Life Stages – Anticipating Change

The research data was considered broadly to find the areas of life that are common to most people, seeking "universals" that would provide guides to understanding personal futures. The first area of commonality explored was the biologic and psychological stages of human life. Here we looked back to eight life stages attributed to Hippocrates (Opsopaus, 2000) in ancient Greece, then up through history and religion to the mid-twentieth century work of Erik Erikson (1979), dominant in modern psychology. Erikson also divided life into eight stages, each stage marking important changes in each individual's life. Since Erikson's research however, life expectancy and life spans have increase substantially, with approximately one fourth or more of life falling into the stage that Erikson termed "Old Age."

As a consequence, we suggest that "Old Age" can be divided into four potential stages, based on the individual's physical and mental state or condition rather than chronological age. With some additional modifications, we propose a total of ten life stages for guiding individuals in the study of their personal futures. These ten stages are based primarily on important and recognizable change in each individual's life. The ten stages proposed for personal futures are shown as Table 1:

Table 1: Ten Life Stages Illustrating Major Change Points in Life That Can Be Anticipated

Life Stage	Characteristics of Life Stage
Infant	Birth to 2 years. Dependent, brain developing, learning motor skills and sensory abilities.
Child	3-9 years Growing and mastering motor skills and language. Learning to play and socialize. Continued growth, formal school and organized activities.
Adolescent	10-19 years. Growth spurts. Puberty brings hormonal changes and reactions. Strong emotions often rule decisions. Risks for alcohol, drugs, tobacco, etc.
Young Adult	20-29 years, Completing education and beginning career and family. Potential coping and financial pressures.
Adult	30- 39 years. Managing family and career growth. Increasing numbers of couples are starting families in this stage. Continued coping pressures.
Middle age	40-60 First signs of aging and effects of lifestyle, menopause, children are leaving the nest, grandchildren arrive, career peak. Aging parents may require care
Independent Elder	60 onward. More signs of aging and lifestyle effects. Eligible for Social Security, Medicare, pensions. Retirement. More discretionary time and opportunities. Travel and sports. Some health problems and medications. Caring for others.
Vulnerable Elder (not related to chronological age)	Beginning frailty, cognitive or multiple health problems. Require some assistance. Stop driving. Possible move to Assisted Living facility.
Dependent Elder (not related to chronological age)	Requires daily care. Unable to perform all personal functions. Possible move to nursing home.
End of Life (Six months) (not related to chronological age)	Diagnosed with terminal condition or stage of disease. May require hospice care, hospitalization or nursing home care.

These life stages offer insights into major changes in each individual's life that can be anticipated, either for oneself or for family members.

Personal Domains – The Forces That Create Change

During the analysis of the life stages research, trajectories (Elder, 1999) became apparent. For example the trajectory spanning education, career and retirement. Further exploration brought the realization that these trajectories were related to important or "driving" forces (Schwartz, 1991 p.101). Driving forces are those forces in individual's lives that motivate or pressure the individual to take actions or to make changes in life. Further research and analysis suggested that these forces fell into six categories, which we have labeled domains. It further appeared that these categories were "universals" that would describe forces common to the lives all people and that are present from birth to death. The primary research methods utilized to develop the original data were surveys and interviews. When the results were compared and categorized, six distinct categories of forces that exist in people's lives emerged. These domains are shown in Table 2 with typical forces and descriptive attributes.

Table 2: Six Personal Domains and Common Forces within Each Domain

Activities Domain- All the things you do. For example:

School- training, self-improvement, from pre-school through the rest of your life.

Work or career

Religion and related activities

Sports, hobbies, travel, games and entertainment

Finances Domain- Everything related to your finances. For example:

Income, assets

Expense, debt, liabilities

Investments

Risks, insurance

Health Domain- Everything related to your health. For example:

Health status- conditions or diseases,

Medications

Diet and exercise

Medical care, care you receive from professionals

Personal care help you receive with the activities of living

Housing Domain- Everything related to your home and where you live. For example:

Home- house, apartment, mobile home, care facility

Community your neighborhood and community

Nation, the country and world region where you live

Climate

Social Domain- Everything to do with people in your life. For example:

Family, friends

Co-workers, community

Advisors

Organizations

Transportation Domain- Everything to do with mobility and access. For example

Mobility-walking, wheelchair, scooter

Personal transportation- automobile, bicycle, motorcycle

Local public transportation- bus, taxi, local train, ambulance

Long distance public transportation- train, airplane, ship

Any one of these domains, or even one force within a domain, can be a driving force at a given time in life, or during a life stage. An individual's career, a force in the Activities domain, is usually a driving force from one's middle to late twenties, the Young Adult stage, until retirement, which may occur during Middle Age or during the Independent Elder stage. At this point, it is apparent that the Life Stages and the Personal Domains present two axes that form a matrix. Life stages, either one stage or several, form the horizontal axis of the matrix with the six personal domains providing the vertical axis, as will be shown in the next section. The cells at the intersection between Life Stages and Personal Domains create a location to enter the events that occur during life, particularly events that can be anticipated.

To visualize a personal domain, individuals can use a simple format such as shown in Figure 1. This format asks the individual to estimate, in his or her personal opinion, the quality level of a domain at different ages in life up to the present. The result is a trend line that indicates the changes in that domain over the person's lifetime and the direction of change in that domain at the present.

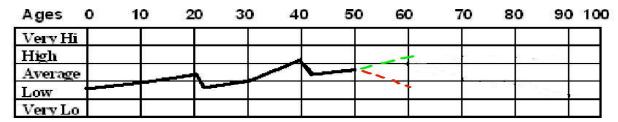


Figure 1. Format for Graphing the Quality Level a Personal Domain from Birth to the Present. Note: The dashed lines represent positive and negative extrapolations into the future.

This chart and the resulting trend line provide a basis for extrapolation of that domain into the future. Two extrapolations, one positive (top line) and one negative (bottom line) provide a basis for building positive and negative personal scenarios. Note that as the extrapolation extends into the future, the extrapolation becomes more uncertain, causing the two lines to grow further apart.

Life Events

Life events are simply the things that happen in individual lives, yet life events are also the visible expression of the forces in life. As a consequence, each life event occurs within a personal domain. In the context of anticipating personal futures, the events of greatest interest will be those that have some measure of impact on an individual's life and some probability that the event will occur. Events may be categorized in many ways, including positive or negative; turning point; intentional or unintentional (Tough, 1982); cyclical, legal; high impact; high probability and others. Research by Holmes and Rahe (1967) and Miller and Rahe (1997) studied the impacts of various life events on individual's lives and developed tables describing the relative impacts of various events over time.

The following table shown as Table 3 lists a number of events that are common in people's lives, then associates them with a life stage in which the event may occur. The table also lists some events that carry high impacts to the individual's life.

Each life event is directly associated with a personal domain. Anticipating when an event may occur or even during which life stage provides a challenge, but simply understanding that an event is probable and that the event may have a strong impact is helpful to the personal planning process.

From Research to Application

These three areas, Life Stages, Personal Domains and Life Events summarize the underlying research for the study of personal futures, yet the results have little value without placing them in the context of personal goals and values in human lives. We developed a number of worksheets and a workbook (Wheelwright, 2006) to help individuals record information about their lives then apply futures methods, including scenario development and strategic planning. From the personal research, individuals can develop personal scenarios. Typically, four scenarios are developed including a "Continuation of the Present" scenario, a "Best Plausible" scenario. A "Worst Plausible" scenario and a "Wild Card" scenario (Bezold, Peck and Olson, 1998). These scenarios provide the individual perspectives from which to create strategies and make plans for the future.

As in strategic planning for business (Goodstein et al., 1992), personal strategic planning (Morrisey, 1992) requires the individual to think about the future and begin making decisions about what he or she wants in the future. The process of defining the important elements of a desirable or preferred future is commonly termed "visioning" as in building a vision of a preferred future.

The application of Life Stages, Personal Domains and Life Events suggested that a systematic approach to planning based on worksheets or a workbook could enable individuals working alone or in workshop settings to develop effective and workable strategic plans in relatively short periods of time.

For futurists, the results of this research confirm the scalability of several futures methods including extrapolation, scenario development and strategic planning to the level of the individual. In addition, the presentations and workshops demonstrate that individuals can learn about and plan for their personal futures in a group or workshop setting (Jungk and Mullert, 1987), an approach to personal futures that had previously been considered impractical by many futurists.

Table 3. A Limited Selection of Common and High Impact Events Shown in Various Life Stages Where They May Occur

Uccur Life Stage	Common		High imm a of
Life Stage Infant	Learning, walk, talk		High impact Serious illness
ınjuni	Minor illnesses		Serious filless
Child	School		Serious illness
Chila	Growth		Bullying
	Minor injuries and illnesses		Parents divorce
Adolescent	School School		Accidents, serious injuries
nuotescent	Puberty, emotions, sex		Arrest
	Growth		Pregnancy
	Begin driving		Parents divorce
	Risky behaviors		Death of parent or friend
Young adult	Complete education		Accidents
108	Begin career		Illness or injury of child
	Move out		Job loss
	Marriage		
	First child		
A dult	Career pressures- advances		Financial pressures
	Managing family		Divorce
	Last child		Job loss
Middle age	Menopause-end child bearing	Aging signs	Serious or chronic illness, self or spouse.
C .	Empty nest		Parent illness or death
	Grandchildren		Crime victim
	Parents retire		Job loss
	Peak earnings, savings		Divorce
Independent elder	Eligible for retirement		Retirement
	Social Security, Medicare		Changing roles & social
	Work/retirement choices		Serious illness, self or spouse
	Discretionary time		Death of spouse
	Great grandchildren		Become caregiver
	Increased aging signs		Stop driving
	Relocate, new friends		
	Travel		
	Problems in children's lives		
Vulnerable elder	Frailty		Falls, injuries
	Cognitive problems		Assisted living
	Risk of falls		
D 1 . 11	Risk of scams, victim of crime		D 1 (1
Dependent elder	Reduced activities		Dependent on others
	Increased medical		Losing control of life
F 1 C1:C	Do Love Louis Sistem		Nursing home
End of life	Reduced activities		Terminal diagnosis
	Increased medical		Hospice

For Human Resource Development professionals, this research suggests that a comprehensive, systematic approach to long term personal and career planning is workable and available. For organizations that are interested in personal or career path development, the personal futures approach offers an alternative that has the potential to benefit both the individual and the organization.

"Good-byes"

In Table 2, for example careers are seen as one of the forces in the Activities domain. Yet careers, as we have suggested are now more complex than simply identifying them in a place on a chart. For the individual, most aspects of a career are different during each stage of life. For the Young Adult (ages 20 through 29), the focus is generally on starting a career. For the Adult (ages 30 to 39) career focus may be on advancing one's career. People in Middle Age (40 through 59) are often at the peak of their careers while many people over 60 are starting to plan for retirement or reduce their commitments to the workplace. The stage of one's life is an influencing factor on the individual's career.

Although careers are located in the Activities domain, and are an important or driving force in several stages of life, careers also influence other domains, and may be influenced in return. Obviously, one's career influences one's

finances, which in turn may influence the other domains. Careers may also influence one's health, for example professional athletes such as bull riders, skiers, race car drivers, football players and others put themselves at physical risk for their careers. Miners working in unhealthy atmospheres, professional military, police, firefighters and many other careers may also put an individual's health or life at risk.

Where a person lives, the neighborhood, community, region or country can influence the choice of career and one's opportunities in a career path. At the same time, one's career may influence where and under what conditions the individual lives.

The important question here is, "What are the potential benefits of Personal Futures to HRD professionals? Buchen (2006) suggests there is a direct association between futures learning and employee productivity. He goes on to state, "The next logical step is to push inquiry into the future itself." He adds that "...endowing empowerment with more forward-looking vistas, workers can be invited to speculate on what they believe their jobs will be like in the future" (p.46). This process invests the individual with the future of the organization.

Senge (1994) is quite specific about the importance of personal learning within the context of learning organizations. In listing the five disciplines that are the "core of learning organizations" the first discipline listed is "Personal Mastery" (p. 6) and an entire chapter is devoted to this area. In *The Fifth Discipline* (1990), Senge defines personal mastery as "...the discipline of continually clarifying and deepening our personal vision, of focusing our energies, of developing patience, and of seeing reality objectively" (p. 7).

It is our contention that Personal Futures is a critical component of personal mastery, and therefore a critical component of organizational learning. Further, individuals who are able to understand their personal lives, state their values, identify alternative futures and build visions and personal strategic plans will have a better understanding of those same processes within their careers and their organizations.

Another point of interest for HRD professionals relates to the fact that organizations of all sizes are facing the potential retirement of a sizeable demographic segment, the baby boomers, over the next several years. Understanding individual plans and preferences for retirement may be beneficial to the organization and to the individual, for example in the case of exploring the extension of career paths beyond typical retirement ages. Our research suggests that individuals of retirement age are beginning to recognize that retirement may be counted in decades rather than years. This fact may make individuals more open to continuing work after normal retirement age. Willingness to continue working appears to be strongly related to each individual's health (Williamson and MacNamara, 2001) or financial circumstances as well as to the flexibility of the working schedule and the interest value of the work. This suggests some potential value in long term personal planning, both for the individual and the organization.

Conclusion

The result of the research reported in this paper has been the development of a process that helps individuals to understand the natural changes, forces and events that are likely to occur in their future lives, and to encourage the development of personal strategic plans for their careers and their lives. For individuals as well as for HRD professionals, understanding the changes, forces and events in people's lives, whether past, present or future, provides an additional set of tools for understanding normal, but personal, influences that impact the workplace and individual career paths. Many of the methods used by futurists may already be familiar to HRD professionals at the enterprise level, yet this paper may be the first introduction to the application of environmental scanning, scenario development, visioning and strategic planning to the lives of individuals. Our research has demonstrated that these methods do scale down to meet the needs of individuals. Participants in personal futures workshops have found this approach to learning about personal futures to be effective and have stated that the results have been beneficial to their lives.

In an age of the disappearing straight-running road, as implied by the term career, individuals and HRD professional need new tools, in terms of ideas that provide a way to talking, and physical artifacts to help them in the construction of new paths, probably several times throughout a life. The research reported in this paper, we believe, has begun to offer a significant contribution in this direction. In this way, the methods of futurists can now be made available to HRD professionals and individuals.

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