

# HOW-TO GUIDE FOR USING THE SCENARIOS

ALERTA

# DEMOCRÁTICA

Scenarios for the future of  
Democracy in Latin America  
2015–2030

ALERTA DEMOCRÁTICA

# HOW-TO GUIDE FOR USING THE SCENARIOS

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Execution

 InstitutoReos

 ReosPartners

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# ABOUT THE SCENARIOS

What are the scenarios and why should I use them?

## Latin American Democracy in 2015 is at a crossroads from which different possible paths exist

The **ALerta Democrática** scenarios are the collective creation of a group of 37 leaders from across Latin America. This team worked together, in eight days of workshops, to identify key forces at play, ask burning questions, and create stories about what the future might hold.

The group built four future scenarios for democracy in Latin America:

DEMOCRACY IN

### TRANSFORMATION

A scenario of redistribution of power, strengthening of democracy and institutional innovation

DEMOCRACY IN

### TENSION

A scenario of a democracy in appearance, where power is concentrated and disputed among different political and economic forces, generating social frustration.

DEMOCRACY IN

### MOBILIZATION

A scenario of popular mobilization, pressure and creativity challenging traditional power structures.

DEMOCRACY IN

### AGONY

A scenario of a hijacked democracy, dominated by organized crime, and generating fear and a sense of defeat among citizens.

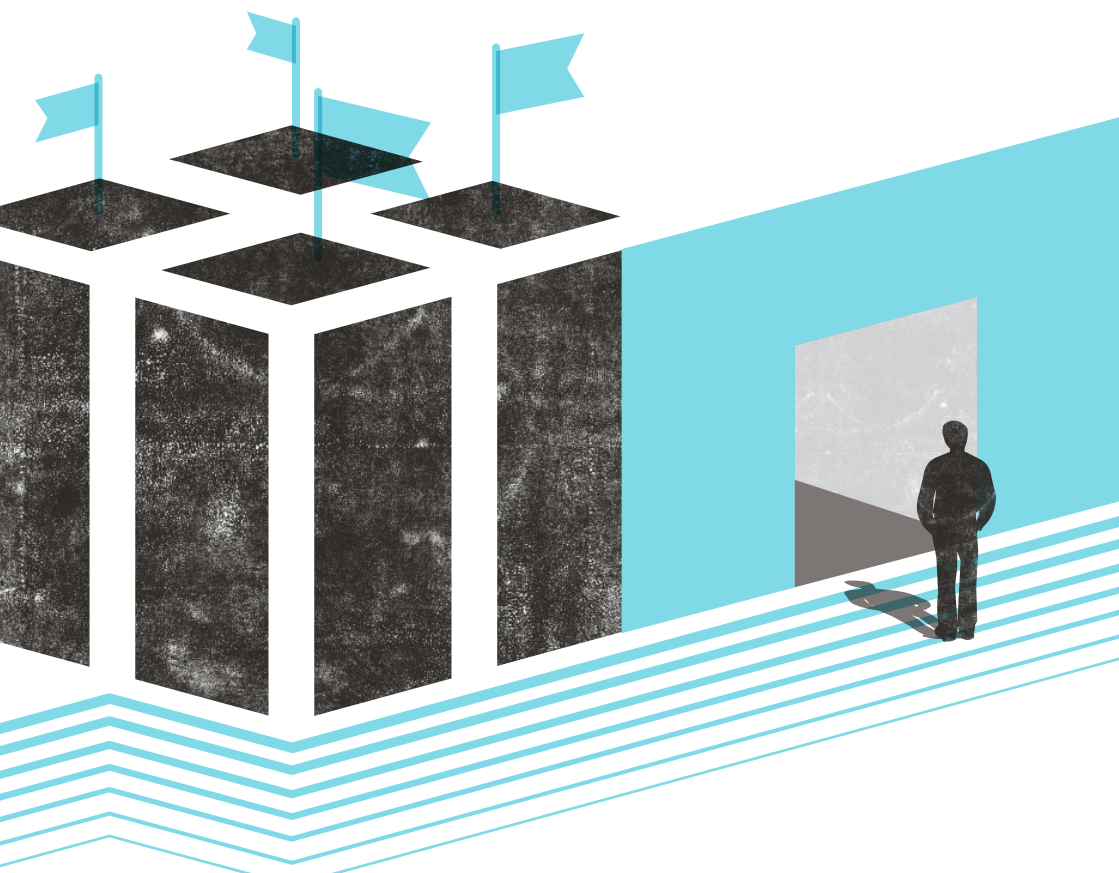
These scenarios are *not predictions*.

They are *not proposals*.

They are *stories* that describe possible pathways into the future to help us talk and think more deeply about our current reality.

The purpose of the exercise is to:

- **Catalyze** open and reflective *strategic thinking and conversation* among Latin Americans about the possible future of their democracies, and about the opportunities, risks, and choices these futures present
- **Stimulate** individual and collective *strategic actions* to influence these futures



**The transformative scenario planning process enables politicians, civil servants, activists, businesspeople, trade unionists, academics, and leaders of other stakeholder groups to work together to construct a shared understanding of what is happening and what could happen in their system, and then to act on the basis of this understanding.**

**The focus of transformative scenario planning is the development, dissemination, and use of a set of two, three, or four scenarios (structured narratives or stories) about what is possible. A scenario is a story about what could happen: an internally consistent hypothesis about the future that is relevant, challenging, plausible, and clear.**

**Scenarios provide a shared framework and language for strategic conversations within and across stakeholder groups about the situation they are part of and what actions they can, must, and will take to address it. Transformative scenario planning thereby offers a way for social systems to get unstuck and to move forward.**

—Adam Kahane  
Author of *Transformative Scenario Planning*

”

The success of a scenario or set of scenarios is not evaluated by whether these situations occur in the future, but rather on whether they influence the strategies and choices of today. Sometimes the most significant scenario is, in hindsight, the one we manage to avoid.

In developing scenarios, we create a common language that allows us to talk about the challenges of the present and the future. Based on this conversation, we can make choices and form strategic alliances that allow us to promote the future reality that we desire.

Therefore, for the scenarios to be successful, it is essential for people to reflect on and talk about them. This reflection may be individual or collective, face-to-face or virtual. We encourage any concerned citizen to gather with others to talk about the different stories and their implications.

The purpose of structured reflection on the scenarios is not to arrive at a consensus about what *will* happen. It is to engage a diverse group of participants in a discussion about what *could* happen, using the scenarios to inform and inspire individual and collective strategies, illuminate possible pathways, and clarify next steps.

*We suggest you familiarize yourself with the content of the four scenarios before using the tools in this booklet.*

You will find the full scenarios report, along with other useful presentation materials that can be freely used and reproduced, on the project website: [www.alertademocratica.org](http://www.alertademocratica.org)

Please also contribute your ideas via our Facebook page: [www.facebook.com/alertademocratica](https://www.facebook.com/alertademocratica)

# INDIVIDUAL REFLECTION ON THE SCENARIOS

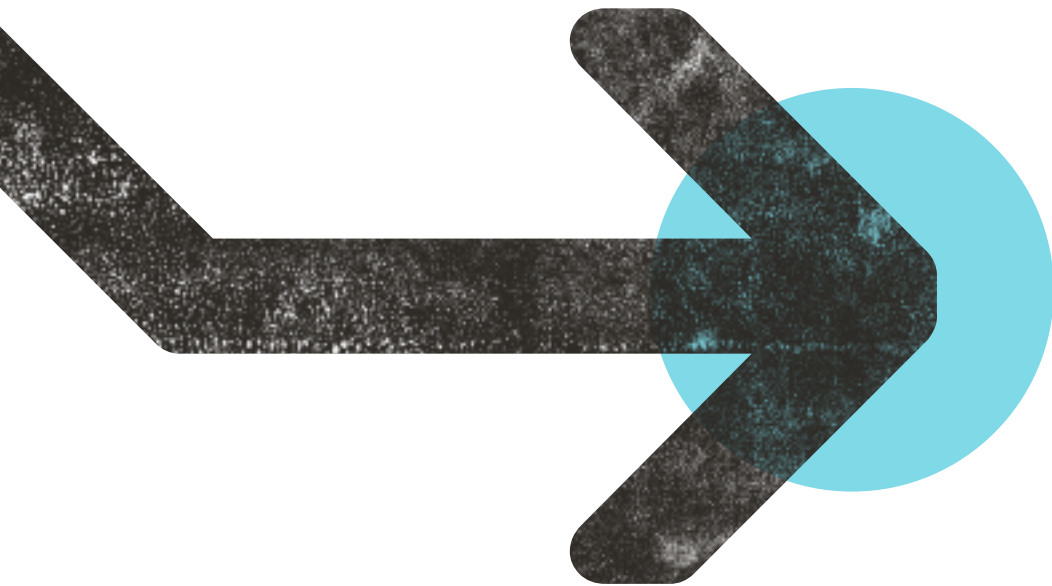
**How do I personally reflect  
on the scenarios and discover  
my own role in influencing them?**



**The ALerta Democrática scenarios are relevant for every citizen and leader from any sector across the region. Everyone has a role in determining the future, and everyone is affected by how that future plays out in our countries.**

We offer here a set of questions and tools for individual reflection on the scenarios. We encourage you to engage with these questions personally, whether for five minutes or for several hours, to deepen your thinking about democracy in the region and your role in it.

We invite you to share the results of your reflections, if you wish, with your peers, with partners and collaborators, and even with those you disagree with, through virtual or face-to-face interactions.



## Questions for individual reflection

### EACH SCENARIO

What feelings does each scenario evoke in me?

What most stands out for me about each scenario?

If this scenario happened, what impact would it have on me, my family, my community, and my organization?

What opportunities can I make the most of and what threats do I face in this scenario? What would I need to do to get by in this world?

What can I do today to prepare for this possible future?

### THE SET OF SCENARIOS

What feelings does the set of scenarios as a whole evoke in me?

What do I see now that I didn't see before?

**THE FUTURE**

What worries me about the future?

What excites me about the future?

**DEMOCRACY**

What is democracy to me?

What is my vision for democracy in my country?

**MY ROLE**

What is my sphere of influence?

What role do I want to play?

What can I do to influence these futures?

What actions can I take?

**Tools for individual reflection**



**CONTEMPLATION**

Contemplation means observing and thinking about something without judgment. You may want to read the scenario narratives calmly and reflectively with the above questions in mind, spend some time in silence, and notice what insights and meaning emerge for you.



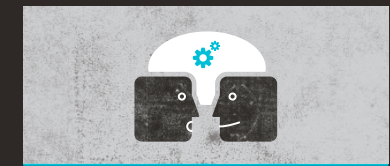
**JOURNALING**

Writing in a journal is a key tool for learning through experience, by noticing, reflecting, and documenting how your ideas evolve. It is simply the practice of immediately writing what comes to mind rather than thinking through the ideas first, and involves writing for yourself rather than for others. Journaling is an opportunity to reflect on ourselves, on our context, and on what we are learning.



**DRAWING**

Another useful tool for individual reflection on a set of scenarios is to draw freely. Try, for example, drawing each scenario with yourself in the picture. Or simply draw something that represents the feeling you have when you consider the scenarios.

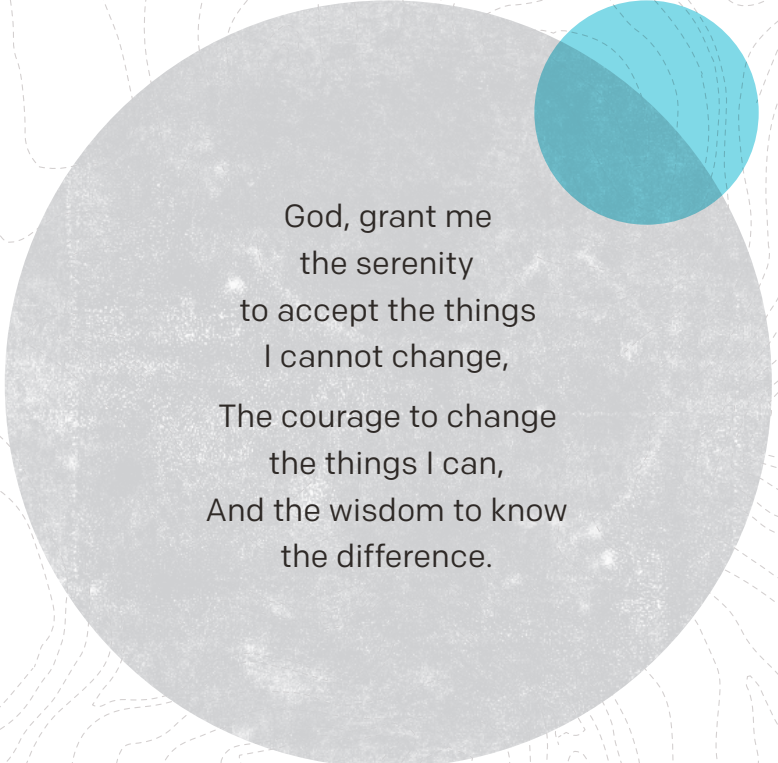


**THINKING WITH A PARTNER**

Together with a thought partner, you may want to express out loud what you are thinking. Have a friend ask you the reflection questions and listen to your answers, provoking you to deepen your thinking as the conversation evolves. Then turn the tables and ask your friend the questions, without expressing your own opinions.



## Serenity prayer





God, grant me  
the serenity  
to accept the things  
I cannot change,  
The courage to change  
the things I can,  
And the wisdom to know  
the difference.

—Reinhold Niebuhr, 1941

## DISSEMINATING THE SCENARIOS AND STIMULATING PUBLIC DEBATE

How do I effectively present  
the scenarios to a group and  
stimulate debate around them?



## The ALerta Democrática scenarios offer an opportunity to engage many diverse voices across the region in drawing attention to the opportunities, risks, and choices we face regarding the future of democracy.

More than a product with a single message, the scenarios are a catalyst to spark reflection, discussion, and action relevant to the diverse contexts of different countries in the region.

We want to generate a *buzz*, repeated across the region through different voices and in different words, to provoke strategic actions and deepen the debate around democracy.

You can contribute to this effort by organizing presentations, debates, meetings, and workshops and by spreading the word about the scenarios through the media and social networks.

### You can contribute to the dissemination effort:

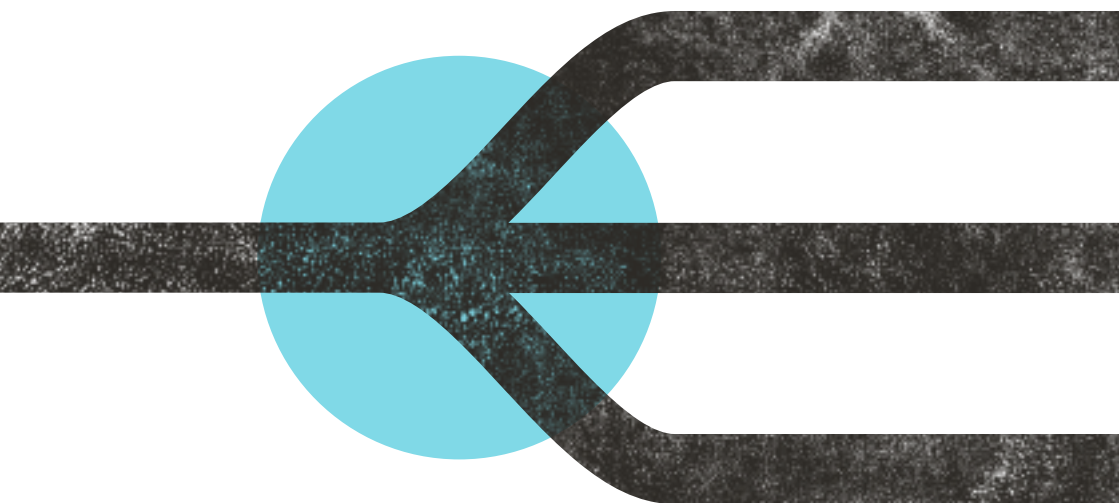
#### RESPONSIVELY

- Take advantage of existing conferences and seminars you are participating in to mention the scenarios and their messages
- Comment on current political events in the context of the scenarios
- Follow ALerta Democrática and others who comment on democracy on Twitter and Facebook, and re-tweet/re-post relevant items
- Frequently check the website and spread the word about launch events and webinars



#### PROACTIVELY

- Organize a public event
- Schedule a briefing or discussion meeting for your colleagues, peers, or strategic partners
- Offer a webinar
- Reach out to the media
- Actively identify your target audience and reach out to them
- Write articles, blog posts, or tweets related to the scenarios and their messages



## How to organize a presentation event

### DEFINE THE OBJECTIVE OF YOUR EVENT



As the event promoter, you need to clearly articulate the objective. Use the overall scenario process objectives on page 4 as a starting point. You may want to tailor them for your event, for example, “Consider the implications of the scenarios for the xx sector.”

### INVITE PARTICIPANTS



Create an invitation with the information on date, time, venue, and objectives. Create a participant list, and send the invitation. It’s important to extend personalized invitations to the people you most want to attend.

### DESIGN THE AGENDA



See the suggestion on the next page.

### DECIDE THE DATE, TIME, AND LOCATION



Decide where and when the event will take place. For a public event, the location should be accessible to people with disabilities and by public transportation. It should be large enough for people to spread out and preferably be equipped with stacks of chairs, a projector, a computer, flipcharts, and markers. We suggest scheduling a minimum of two hours for the event.

### CLARIFY ROLES



Define with your team who will facilitate the event, who will present the scenarios, and who will document the results and compile the attendee list.

### DOCUMENT THE EVENT AND SHARE LESSONS LEARNED



Take photos and make note of the key points discussed so you can share them on the project’s Facebook page.

[www.facebook.com/alertademocratica](http://www.facebook.com/alertademocratica)

## Possible agenda for presentation events

### 0h00 Welcome and opening

The host welcomes the participants and shares the event’s objectives. The facilitator explains how the event will work.

### 0h10 Introductions

Ask each participant to consider, “If you could speak to a clairvoyant, what question would you ask about the state of democracy in Latin America in 2030?” If your group is smaller than 20 people, ask each person to say their name and their question. If it is larger than 30 people, ask participants to share with their neighbors and then request 5-6 of the questions to share in plenary.

### 0h30 Present the scenarios

Use the executive presentation available on [www.alertademocratica.org](http://www.alertademocratica.org).

### 1h00 Group discussion

Facilitate a discussion in plenary or at small tables followed by a plenary.

— *What signs are we seeing in our country today that one or more of these scenarios are emerging?*

— *What opportunities, risks, and choices do these scenarios present to us?*

### 1h40 Final reflection

Ask some or all of the participants to share their response to the question, “What do I see now that I didn’t see before?”

### 2h00 Close

# COLLECTIVE REFLECTION ABOUT THE SCENARIOS

How do I facilitate a collective reflection around the scenarios?

**Beyond disseminating the scenarios and provoking debate, you may be looking for an in-depth way for a group to consider the scenarios together. For instance, you may want to host a collective reflection in a community, sector, group of peers, or diverse group of citizens who do not work together in their day-to-day activities.**

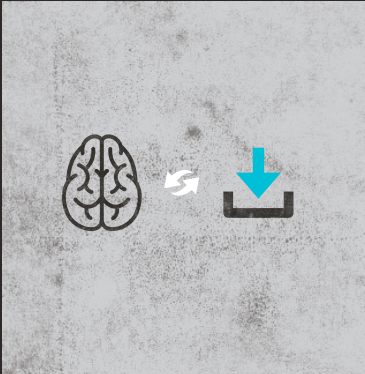
The intention of your collective reflection may be to deepen the group's understanding of what is emerging and/or to brainstorm possible actions.

If you want to reach a deeper level of dialogue, we recommend scheduling sessions that are at least four hours long, so you have time to both grasp and internalize the content of the scenarios, and come to new insights about their meaning for the group.

This section offers you tools and ideas for hosting such dialogues.

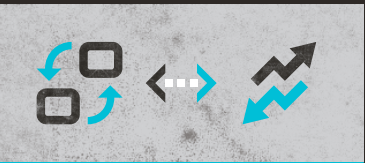
### Levels of conversation

When preparing for a collective dialogue about the scenarios, be aware that there are different types of conversations. Each type has its place and usefulness, described below. Sharing this language with your group may help you to consciously move into a reflective dialogue.




**DOWNLOADING**

Downloading is the mode of conversation where we say what is habitual, polite, known, or expected. We are essentially “downloading” our brain’s customary responses as if we were a computer. While downloading may supply the “right” answer quickly and keep the peace or the status quo in place, it is insufficient when dealing with complex changes in context or seeking to create something new.



**DEBATING**

Debating is different from downloading in that we speak our minds openly, even at the risk of generating conflict. The process of actively searching for alternative facts, perspectives, and options represents a significant leap in the level of conversation. But in this mode, we are still constantly judging whether or not we agree or disagree, and our primary orientation is seeking to be “right.”



**DIALOGUING**

Dialogue is a creative conversation, requiring empathy and self-reflection. In this mode, we listen with attention, speak with intention, and seek to understand and discover new meaning. A truly generative dialogue can help a group to discover its shared purpose and develop collective understanding.

### Tools for dialogue and collective reflection

#### Circle dialogue (for up to 30 participants)

Invite participants to sit on chairs in a circle, and present a question to the group. Ask each person to share their reflection on the question, moving around the circle or inviting them to speak as they are ready. The ideal is to hear each person’s voice. Encourage participants to listen with attention and speak with intention.

#### Small-group conversations

Especially if your group is more than 15-20 people, it is useful to break into small groups for parts of the conversation. You may give the groups a task such as filling in the worksheet below, generating their top three challenges and top three opportunities, or their top three ideas for transformative actions. At the end, come back into the whole group to share learnings.

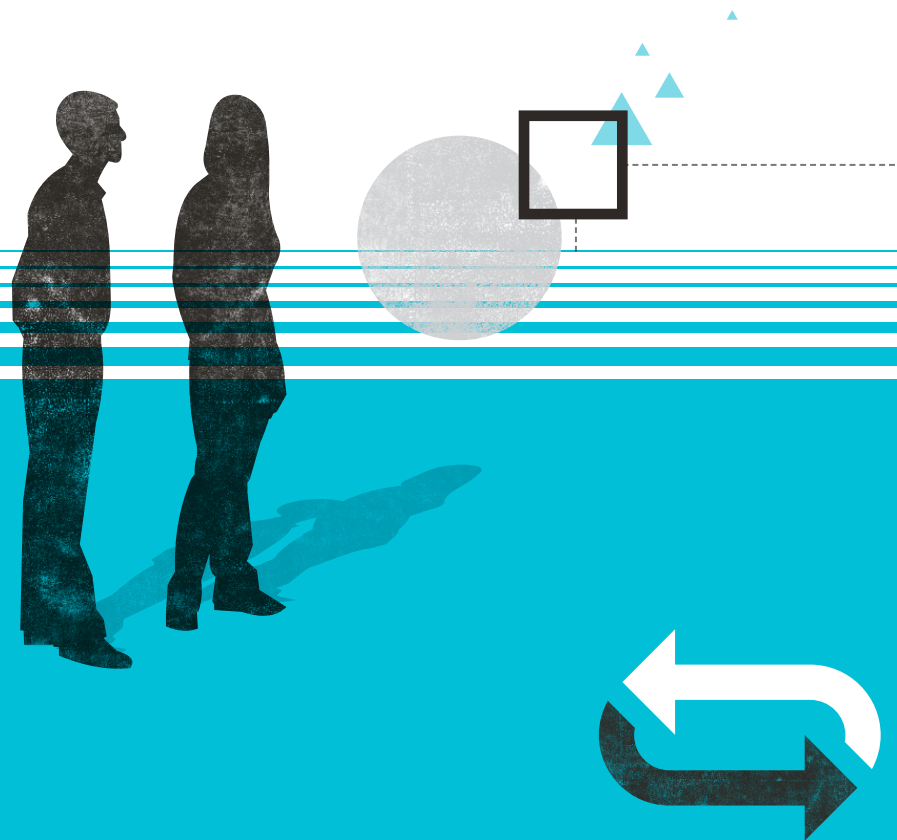
	What opportunities does this scenarios present us with?	What challenges does this scenarios present us with?	What would we do to adapt to this scenario?	What can we do to influence this scenario?
<b>TRANSFORMATION</b>				
<b>TENSION</b>				
<b>MOBILIZATION</b>				
<b>AGONY</b>				

## Paired walks

We often underestimate the power of walking and talking. Most of our meetings are sitting meetings. By walking together, we can seek inspiration, generate energy and focus, connect with our impulse toward movement, and deepen our collective reflections. Even a 20-minute walk in pairs to reflect together around a guiding question can make a big difference to the productivity and collaborative capacity of a diverse group.

The tools and ideas in the other sections of this booklet can all be adapted for collective reflection. For more collective reflection exercises, also see:

<http://reospartners.com/publication-type/toolkit/>



**Engaging with the future does not take place in the future; it takes place in the present. Having a future focus changes the way we see the present, so much so that we 're-perceive' that present and its strategic requirements. Learning from the future is exciting and challenging because it changes forever the way we engage with the present.**

—Oliver Freeman



### Sample questions for collective reflection

All the questions from the section on individual reflection (page 10) can also be applied to a process of collective reflection. By sharing our answers in a group, we may deepen them for ourselves.

In addition, there are other questions that are particularly useful for collective dialogue:

<p>What strikes us as interesting about the scenarios?</p>	<p>What signs are we seeing that indicate one or more of these scenarios are realizing themselves?</p>	<p>What do we see as the most important forces influencing the future of democracy in our country?</p>
<p>What are the most important levers for influencing the future of democracy in our country?</p>	<p>What do we see as the highest potential for democracy in our country in 2030?</p>	<p>What is the collective sphere of influence of this group?</p>
<p>What ideas can we think of for actions that could influence the future of democracy in our country?</p>		

# THE SCENARIOS IN EDUCATION SETTINGS

How can I incorporate the ALerta Democrática material into an existing educational program?

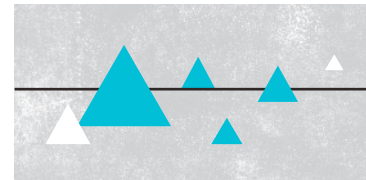


## The scenarios can be a stimulating element in academic programs on politics, sociology, economics, business, public administration, Latin American affairs, or other disciplines.

Use the slide presentation provided on the website to prepare a lecture on the scenarios, and/or assign the report, website, and social media posts as pre-reading before you hold a class discussion.

Another option is to organize an academic debate or seminar about the four scenarios, inviting participants to comment on the challenges and opportunities they see reflected in the scenarios and the policy or strategy implications.

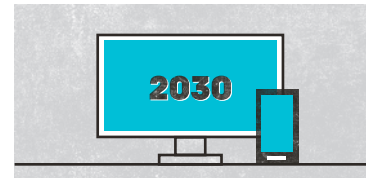
### Ideas for student assignments



What signs do you see of these scenarios emerging today? Write an essay defending the plausibility of each scenario, using data on current trends.



Which scenario do you consider to be the most relevant and challenging? Write an essay or prepare a presentation explaining your argument.



What will the news media say in the future? Write a newspaper article, press release, or blog entry for each scenario from the perspective of the year 2030.



Considering these scenarios, what forces do we most need to monitor? Write an essay in which you discuss the patterns and trends you see today.



Rewrite one of the scenarios, maintaining its essential meaning, but contextualizing it specifically for your country or territory.

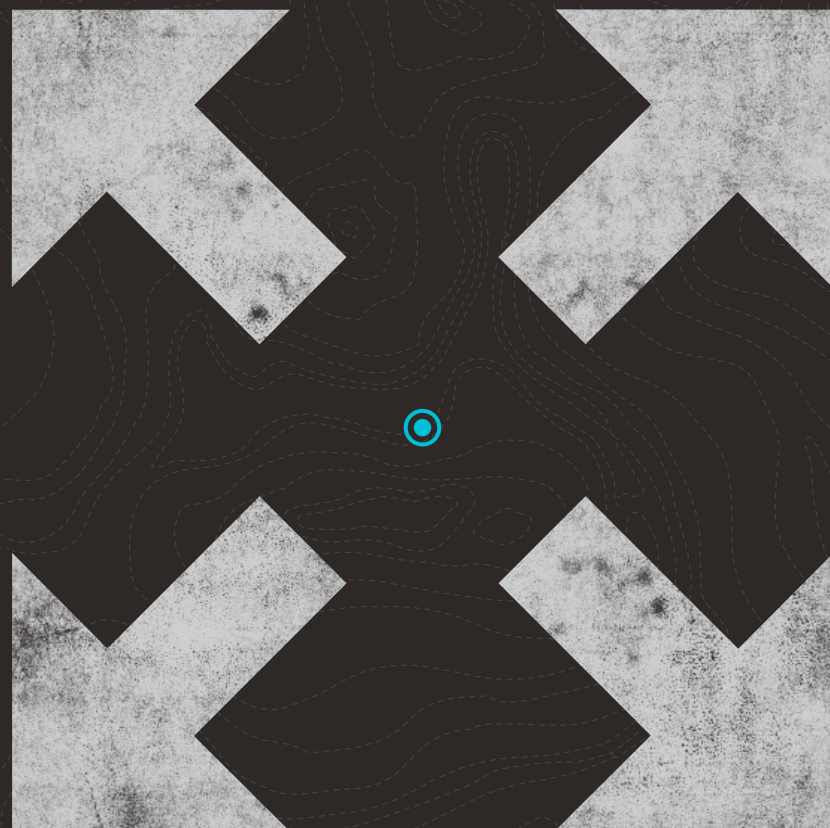


Create a role play or art piece reflecting the meaning of the four scenarios for you.



# STRATEGY AND POLICY DEVELOPMENT WITH THE SCENARIOS

**How can my organization or others use the scenarios to improve our strategy or policies?**



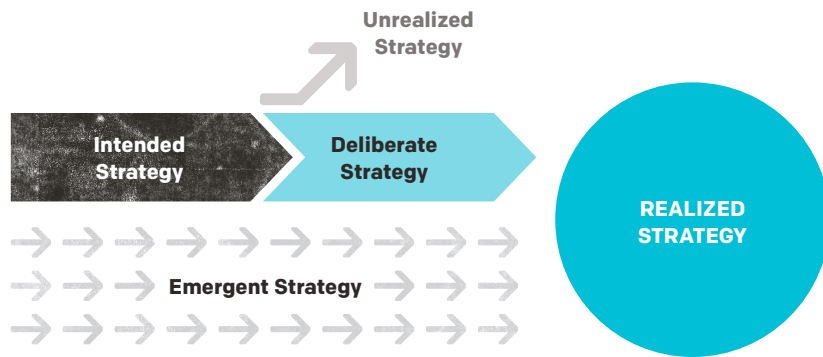
**Scenarios are a useful tool for developing or rethinking an organization's or collective's strategy and for guiding the development of new policies.**

When we work with scenarios, we are looking at the big picture and the long term. The scenarios do not directly provide the answer for what you should do tomorrow. But by reflecting on the implications of each scenario, you can consider what position you want your organization to be in, what forces you need to pay attention to, and where your effort is best spent in the unfolding future of democracy in Latin America. The scenarios also create a strategic clarity that will help you to plan initiatives and actions.

Here are ideas, questions, and tools you can customize to meet your particular strategic planning needs.

### Emergent strategy

In most situations, a group will already have strategies or policies in place, but strategy should always be emergent and alive, because the context is always changing. This is particularly true for organizations working with topics as complex and dynamic as democracy in Latin America.



Source: Henry Mintzberg

Based on the idea in the diagram above, scenarios can help you to consciously develop and incorporate the emergent strategy into your realized strategy.

### Objectives of a scenario-based strategic planning exercise

**To better understand the driving forces affecting democracy in Latin America.**

**To identify the challenges and opportunities the scenarios present to the organization or collective.**

**To develop strategic direction and priority initiatives for the organization or collective.**

**To build participants' ability to see the big picture and the long term.**

### Questions for strategy development

<p>What opportunities, risks, and challenges do these scenarios present for our organization or collective?</p>	<p>What forces, indicators, or warning signals in our context do we need to be paying attention to?</p>
<p>Considering these four scenarios, how do our current strategies hold up?</p>	<p>In each scenario, what position would we want to be in?</p>
<p>What is our desired reality?</p>	<p>What strategies/policies do we want to pursue?</p>
<p>What do we need to stop doing, what do we need to start doing, and what do we need to continue doing?</p>	<p>What do we need to think about and what do we need to do now?</p>

### Tools for strategy development

#### SWOT

A SWOT analysis is a commonly used method for evaluating strengths, weaknesses, opportunities, and threats for a particular organization or initiative. Because it provides a framework for looking at both internal and external factors, it is a simple and interesting mapping tool to work with in the light of a set of scenarios.

HARMFUL	HELPFUL	I N T E R N A L
<p><b>WEAKNESSES</b> In light of these scenarios, what are our organization's weaknesses that place us at a disadvantage in adapting to or transforming the future of democracy?</p>	<p><b>STRENGTHS</b> In light of these scenarios, what are our organization's strengths in being able to adapt to, or transform, the future of democracy?</p>	
<p><b>THREATS</b> In our specific context, what threats do the scenarios present us with?</p>	<p><b>OPPORTUNITIES</b> In our specific context, what opportunities do the scenarios present us with?</p>	E X T E R N A L

Work as a group to write examples of strengths, weaknesses, opportunities, and threats on post-it notes, and place them on one or more flipcharts. The advantage of using post-it notes rather than writing directly on the flipcharts is flexibility: You can easily change the post-its and move them between quadrants if, for example, something that one person considered a threat can also be rephrased as an opportunity.

The strategy session does not end with a SWOT. The SWOT is a mapping tool to contextualize the implications of the scenarios for your specific organization before moving into defining your strategy in light of the scenarios.

## Identifying leverage points

A leverage point is a place where you can strategically take action to address a given situation. It is *low leverage* if a small amount of force will lead to a *small* change. It is *high leverage* if a small amount of force can lead to a *large* change.

In dealing with complex social problems, high-leverage points are those that address root causes. One way to identify root causes is to continually ask “why?”

Identify an event that concerns you related to democracy in your context.

Ask “Why did that happen?” then ask of the answer, “Why is that?” and continue to ask “why” until you believe you have reached a root cause.

Having identified root causes of certain situations, think about your *sphere of influence*. *Where do you have the resources and capacity to apply solutions? How can you expand your sphere of influence through partnering?*

Next, consider where your organization could invest its energy and resources to achieve the highest impact for the effort invested. Consider, “Where is our power?”



## Visioning

In this activity, each participant draws a picture of their desired reality. They should include themselves and the organization in the picture. For inspiration, you may want to consider what is happening in your desired reality for each of the five differentiators that distinguish the ALerta Democrática scenarios from each other. In the comparative table of the scenarios available on the website and in the scenarios report, you will see that these differentiators are:

### Differentiators

Power structures

Democratic institutions and political culture

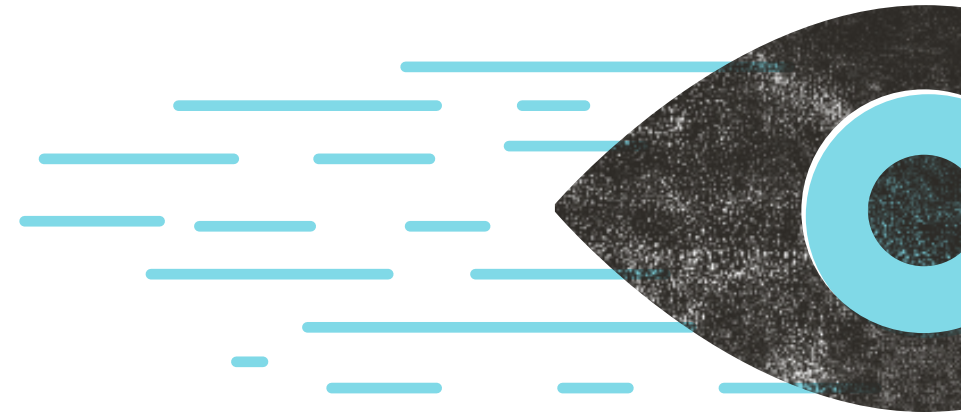
Citizen participation

Economic development and social inclusion

Regional integration

After drawing the vision, consider:

- *What would have to happen for this situation to be true?*
- *How could these things happen, given the strengths, weaknesses, opportunities, and threats we identified?*



## Defining your strategic intent

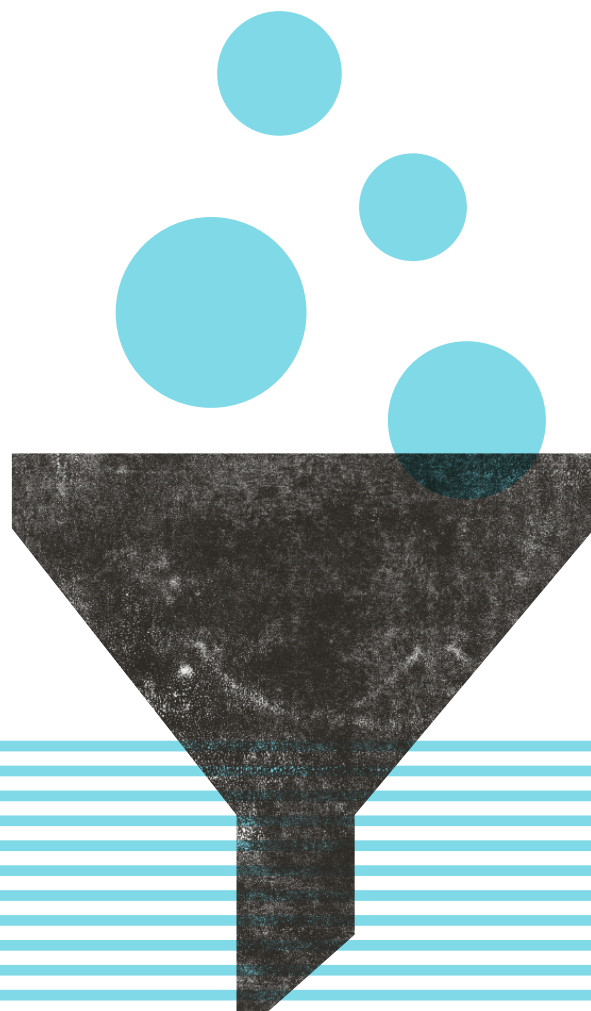
Based on your SWOT, your leverage points, and your vision, clarify your organization's strategic intent:

**Strategic Intent** = A clear and easily understandable statement of the actions the organization will take.

Ask each team member to try phrasing a strategic intent statement.

Identify as a group where these statements are similar or different.

Seek agreement on a collective statement.



**Fear and discomfort  
are an essential part  
of strategy making...  
true strategy is about  
placing bets and  
making hard choices.**

—Roger L. Martin



## Brainstorming options and actions

Once you have clarified your higher-level strategic intent, you may want to brainstorm your short-term options and actions.

Start the brainstorm session with the question, *“What actions can we take in the next year to help us to achieve our strategic intent?”*

Ask the group to generate ideas for actions on post-it notes, and briefly read them out one by one.

### Guidelines:

**Don't dismiss or debate any ideas during the brainstorm.**

**Listen to other people's ideas and see if they spark ideas for you.**

**Allow for wild ideas.**

**Generate as many ideas as possible.**

**Stay focused.**

**Be visual – include sketches and diagrams.**

With many options on the table, as a group, choose the ones you think deserve further consideration. Consider the potential implications and impacts of the scenarios on the identified options.



## Prototyping strategic actions

Prototyping is a way to build, test, and refine a strategic action before investing considerable resources in it. It's the process of deploying a series of small-scale experiments to quickly assess the strength of the idea, and then adapting the idea based on what you have learned.

Through prototyping, you take an unproven idea and turn it into one supported by feedback, data, and observation.

### Steps in prototyping:

**Build a model of your idea (this may be a drawing or a 3D model using modeling materials).**

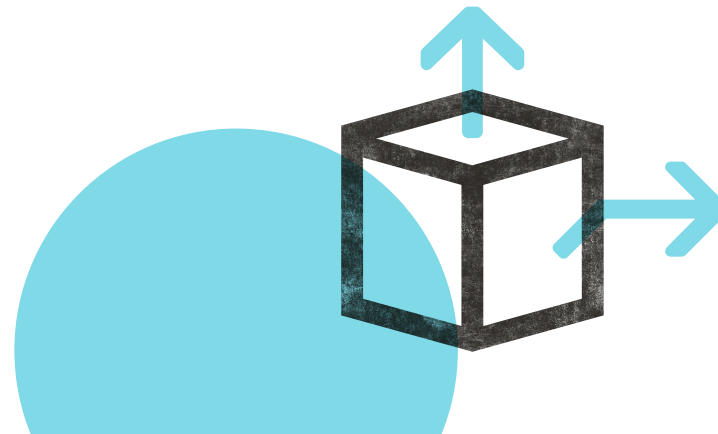
**Invite colleagues to give you feedback.**

**Rebuild the model, taking the feedback into account.**

**Test the initiative at a small scale and closely observe the results.**

**Incorporate lessons learned and further refine the idea.**

Prototyping is a learning process. It's crucial to keep a record of the information, insights, and feedback gained as the idea being prototyped evolves. Through iteration, the idea can evolve into something worthy of implementing on a large scale.



### Considering internal implications for your organization

Your strategy is not only about what actions you want to take in the world outside. It is also about how your organization may need to adapt its own culture, capacity, structure, and way of operating.

**Consider:**

**What organization do we need to become by 2030 to respond to these possible futures?**

**What capacities do we need to learn and embody to stay alert and make sense of a fast-changing world and not get stuck in business-as-usual?**

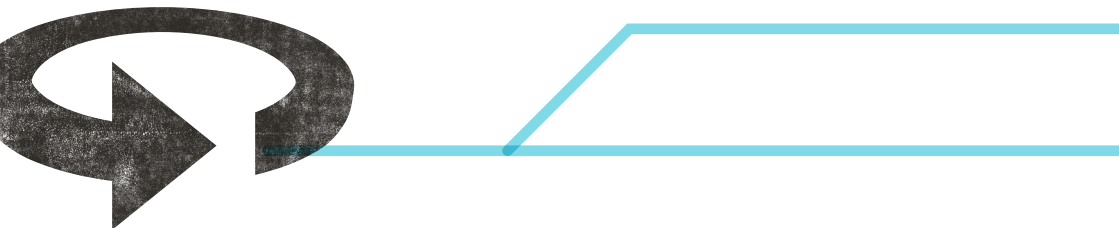
**What steps could we take today to become such an organization?**

Invite your team to create statements related to what the organization could become. Write each statement on a flipchart.

Ask group members to vote with their thumbs on the statements. A “thumbs-up” means “I agree.” A “thumbs-down” means “I disagree.” A horizontal thumb means “I am unsure” or “I have a question.” Ask those with horizontal thumbs to pose their questions, and provide any needed clarification. Then ask those with thumbs-down what they would propose instead. Keep the process going until you have a set of 5-6 high-level statements that most team members agree on and are inspired by.

Then discuss:

- What will help us move forward from here?
- How are we going to drive this process? Who will lead it? If possible, identify a steward for each statement.




### Annotations

A series of horizontal lines provided for taking annotations.







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