

2 SURFACING OPPORTUNITIES AND CONCERNS

**Seeing the Landscape Before
Stepping Into It**

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2. SURFACING OPPORTUNITIES AND CONCERNS - LEADERS

Before we engage with specific scenarios, it's important to take stock of the broader environment. This chapter invites you to look outward—to notice emerging signals, disruptive trends, and critical uncertainties shaping the future of research, knowledge, and higher education.

These activities will help you:

- Identify forces of change already visible on the horizon
- Reflect on what feels possible, provocative, or unknown
- Build shared awareness of the complex world your strategies must navigate

This is where foresight shifts from imagination to strategic orientation—from “what might happen?” to “what should we be paying attention to now?”

2. SURFACING OPPORTUNITIES AND CONCERNS - FACILITATORS

This chapter marks a shift in tempo. Whereas Chapter 1 is about personal reflection and group connection, Chapter 2 invites participants to scan the external landscape.

These activities are:

- Grounded in real-world observation—not speculation
- Focused on drawing out diverse signals and perspectives
- Meant to slow the rush to solution mode and encourage broad curiosity

You don't need participants to agree. You need them to notice, compare, and begin recognizing the complexity of the world their strategies must respond to.

Encourage listening, pattern recognition, and relevance to institutional context. These activities lay the foundation for richer scenario engagement in Chapter 3.

2.1 DRIVERS AND SIGNALS

Building a Foundation for Foresight Thinking

Before we explore specific trends or scenarios, it's important to understand the basic tools of foresight. This section introduces two key concepts:

Drivers of change are powerful forces—technological, political, economic, environmental, or cultural—that shape the direction of the future over time.

Signals of change are early signs, weak indicators, or novel events that may hint at larger patterns to come. They are things happening today that you instinctively feel will take us in a new direction

This section will help you distinguish between long-term influences and short-term signals, and begin noticing how today's early signals might connect to deeper systemic shifts. You don't need to predict what's coming—you just need to get better at noticing.

2.1 DRIVERS AND SIGNALS - FACILITATORS

Purpose: This activity introduces participants to two key foresight concepts:

Drivers of change: long-term forces that shape how the future unfolds

Signals of change: early signs, weak signals, or novel developments that may indicate emerging trends

By exploring these distinctions, participants begin to sharpen their strategic attention and build a shared foresight vocabulary.

Group Format:

Can be done in small groups (3–5) or as a full-group exercise

Materials Needed:

- Visuals or handouts defining "drivers" and "signals" (slide or print)
- Sticky notes or index cards
- Flip charts or a large wall/whiteboard
- Sticky dots for voting

Optional: pre-prepared examples of drivers and signals in higher ed/AI/library contexts

TIME: 30-40 minutes

USE: To allow participants to identify and share drivers and signals of change

OUTPUT: A prioritized set of drivers and signals that will be used in later activities

2.1 DRIVERS AND SIGNALS - FACILITATORS

1. Introduce the Concepts (5–10 minutes)

Use a simple visual or definition slide to explain:

Drivers = Deep forces (social, technological, environmental, political, economic, cultural) that unfold over years or decades (e.g., demographic shifts, AI advancement, climate adaptation)

Signals = Specific events or weak indicators that may point to the future (e.g., new AI tools adopted on campus, major data ethics debates, a policy shift, a viral trend)

2. Warm-Up Brainstorm (10–15 minutes)

Split into small groups. Ask each group to generate 3–5 examples of:

- Drivers shaping the future of research libraries or higher education
- Signals they've recently observed in news, tech, policy, or practice
- Optional: Offer example cards to inspire ideas.

Have each group write drivers and signals on separate sticky notes or cards.

2.1 DRIVERS AND SIGNALS - FACILITATORS

3. Share and Cluster (10–15 minutes)

Bring all notes to a shared wall or board.

As a group:

- Sort drivers and signals into categories or domains (e.g., tech, policy, social change)
- Discuss overlap, confusion, or distinctions
- Highlight surprising or contradictory ideas

Prompt reflection with questions like:

- Which drivers feel slow-moving but powerful?
- Which signals feel like early clues of something bigger?
- Are any signals clearly linked to specific drivers?

4. Dot voting (10-15 minutes)

Give each participant 5 sticky dots and ask them to place those against the drivers and signals that they consider most important. This will help to highlight key trends for later exercises.

2.2 ENVIRONMENTAL SCANNING

Looking Beyond the Institution to What's Emerging

Before we dive into future scenarios, it's important to step outside the familiar boundaries of our institutions and examine what's happening in the broader world. Environmental scanning is the practice of observing and capturing signals of change—emerging trends, unexpected developments, and evolving dynamics across technology, society, policy, and culture.

This isn't about predicting what will happen. It's about becoming better at noticing what's already beginning to shift, often at the margins or outside our usual view.

For leaders of research libraries and universities, the ability to track external signals is critical. Many of the forces that will shape our missions—AI, governance, public trust, demographic shifts, funding volatility, new research models—are unfolding beyond our walls. By scanning the horizon together, we can build shared awareness, challenge our assumptions, and become more intentional about how we lead in the face of uncertainty.

In this section, you'll engage in a group exercise to gather, share, and reflect on external developments that might be early indicators of future transformation. These may be small or subtle now—but when connected and explored, they offer insight into the conditions that could reshape our work in the years ahead.

This is a mindset-building activity. The goal is not to find the “right” trends, but to sharpen our attention, pattern recognition, and strategic curiosity.

2.2 ENVIRONMENTAL SCANNING - FACILITATORS

Purpose: This activity helps participants observe the external world systematically and identify early signals, trends, and developments that could influence the future of research libraries, higher education, and knowledge ecosystems.

It builds on the concept of drivers and signals introduced in 2.1 and creates a shared pool of external reference points for scenario and strategy work that follows.

Group Format:

Can be done in small groups (3–5). You might assign each group a different theme.

Materials Needed:

- Scanning template (printable worksheet or digital board)
- Sticky notes or index cards
- Flip charts or whiteboards
- Markers, tape, or voting dots

Optional: pre-curated “scanning cards” with recent headlines, innovations, or data points

TIME: 30-45 minutes

USE: To allow participants to examine the external world and identify relevant trends

OUTPUT: A map of the environment that impacts on research libraries

2.2 ENVIRONMENTAL SCANNING - FACILITATORS

1. Frame the Purpose (5 minutes)

Environmental scanning is the practice of looking outward—beyond our own institution—to observe what's changing. We're not trying to predict the future. We're building shared awareness of emerging developments that might shape the context we'll be leading in.

2. Choose Scanning Domains (Optional)

You may choose to assign or allow teams to select a focus area, such as:

- AI and technology in education
- Research infrastructure and scholarly publishing
- Government policy and regulation
- Climate and environmental impacts on institutions
- Social movements, demographic shifts, labor
- Global higher education, internationalization, funding models

2.2 ENVIRONMENTAL SCANNING - FACILITATORS

3. Small Group Scanning (15–20 minutes)

Ask groups to share real-world observations from their own reading, media consumption, and work experience. Prompts:

- What recent developments in AI feel significant?
- Have you seen surprising changes in research, publishing, education, or labor markets?
- Any policy debates, cultural shifts, or tech innovations that caught your attention?

Use sticky notes, a worksheet, or a shared digital board.

Encourage participants to think in terms of:

- What's new or surprising?
- What seems small now, but might grow?
- What's happening outside our sector that could cross into it?

2.2 ENVIRONMENTAL SCANNING - FACILITATORS

4. Share and Cluster (10–15 minutes)

Bring all contributions to a shared board .

As a group:

- Cluster similar signals - use a PESTLE framework (Political, Economic, Social, Technological, Legal, Environmental) to organize trends.
- Introduce “What might this mean for libraries?” as a second-round layer.
- They can also tag insights with qualifiers:
 - Emerging. Declining. Disruptive. Systemic
- Identify “outliers,” wild cards, or early indicators of larger trends

Facilitator prompts:

- What themes are emerging?
- Are any signals reinforcing each other?
- What do we want to learn more about?

2.3 THE THREE QUESTIONS

Uncertainties, possibilities and provocations

Now that you've begun scanning the external environment, it's time to reflect on what those signals might mean for your organization. This section invites you to think beyond what's trending—and start asking: what's truly uncertain? What might open up new strategic options? What could challenge how we've always worked?

These three questions are designed to shift the conversation from observation to interpretation. They help leadership teams move from simply collecting data to thinking strategically and systemically:

- What are the biggest unknowns, worries, contingencies, or critical uncertainties in our operating environment?
- What new possibilities and avenues for success have been opened up by recent events?
- What's the biggest provocation or change to our “business as usual” that should be considered for the long term (5–10+ years)?

You don't need answers yet. This exercise helps define the terrain of inquiry that will guide your exploration of scenarios—and your strategic choices that follow.

2.3 THE THREE QUESTIONS - FACILITATORS

Purpose: This activity helps participants reflect on emerging signals and trends through three structured lenses: uncertainty, opportunity, and disruption. This primes the group to engage with future scenarios more thoughtfully and builds insight into strategic tensions.

Group Format:

Can be done in small groups (3–5). Option to reconvene into full group for synthesis

Materials Needed:

- Flip charts or shared worksheets (1 per question per group)
- Markers, sticky notes, or digital collaboration tools

Optional: large posters with the three questions pre-written for clustering and sharing

TIME: 30-45 minutes

USE: To allow participants to examine signals and trends in a structured manner

OUTPUT: A categorized set of reflections that will be used in later activities

2.3 THE THREE QUESTIONS - FACILITATORS

1. Introduce the Questions (5 minutes)

We've gathered signals and identified possible trends. Now we'll reflect on what those signals suggest for our future—especially where things feel uncertain, surprising, or full of potential.

Briefly explain the purpose of each question:

- What are the biggest unknowns, worries, contingencies, or critical uncertainties in our operating environment? — *Uncertainties help us understand what's at stake*
- What new possibilities and avenues for success have been opened up by recent events? — *Possibilities surface options and strategic openings*
- What's the biggest provocation or change to our “business as usual” that should be considered for the long term (5–10+ years)? — *Provocations push us out of our comfort zones*

2. Small Group Discussion (20–25 minutes)

Assign each group one of the three questions or ask each group to work through all three.

Prompts:

- What recent developments have raised new questions or doubts?
- Where are we seeing opportunity—not just change?
- What feels like it's disrupting our assumptions about how we work?

2.3 THE THREE QUESTIONS - FACILITATORS

3. Share and Synthesize (10–15 minutes)

Reconvene and have groups post their responses. Then as a full group:

- Cluster similar ideas
- Highlight emerging themes or tensions
- Identify ideas that may be useful in the next scenario exercise

Facilitator prompts:

- Which uncertainties cut across multiple themes?
- Which opportunities feel actionable—or speculative?
- Which provocations might we be avoiding or minimizing?

Outcome

A visible, categorized set of strategic reflections that define what matters most moving forward. These insights directly inform the mindset participants bring into Chapter 3: engaging with alternative futures.

2.4: MAKING SENSE OF TRENDS AND SIGNALS

From Observation to Strategic Insight

At this point in the workshop, you've explored the external environment, surfaced emerging signals, and reflected on key uncertainties, opportunities, and disruptions. Now, it's time to synthesize:

What are the most important insights we're carrying forward into our scenario work?

This section helps participants step back from the details and ask:

- Which signals or trends feel most relevant or urgent?
- What patterns or themes are emerging?
- Where might we be seeing blind spots or contradictions?

This activity builds strategic coherence across everything the group has seen so far. It prepares participants to engage with scenarios not as abstract stories, but as plausible contexts for action—shaped by real forces already in motion.

You're not trying to predict. You're trying to clarify: What should we be paying attention to as we look forward?

2.4: MAKING SENSE OF TRENDS AND SIGNALS - FACILITATORS

Purpose: This activity helps participants consolidate their scanning insights and reflections into a small set of **key themes or patterns** that will carry into scenario exploration. This moves participants from listing trends and signals to assessing their implications for research libraries. This stage encourages synthesis, prioritization, and systems thinking. This activity ensures the workshop pivots from exploration to strategic imagination with focus and clarity.

Group Format:

Can be done in small groups (3–5). Option to reconvene into full group for synthesis

Materials Needed:

- Sticky notes or cards from previous sections
- Large wall space, whiteboard, or shared digital canvas

Optional: a 2x2 grid (e.g. Impact vs. Uncertainty) or categories like "Technological," "Policy," "Social," "Research Practice"

TIME: 40-45 minutes

USE: To consolidate findings to date into a core set of themes and patterns

OUTPUT: A set of key themes that will be used in later activities

2.4: MAKING SENSE OF TRENDS AND SIGNALS - FACILITATORS

1. Frame the Purpose (5 minutes)

We've seen dozens of signals, trends, and reflections. Now we want to bring that together—pulling out the threads that matter most as we shift into scenario thinking.

Explain that this isn't about consensus. It's about surfacing themes, tensions, and insights the group should carry forward.

2. Group Clustering (15–20 minutes)

Invite small groups to:

- Revisit the trends/signals/uncertainties they've collected
- Choose and cluster the ones they believe are most important
- Create headline themes for each cluster (e.g., “AI Maturity Gaps,” “Shifting Research Governance,” “Invisible Labor in Digital Infrastructure”)

2.4: MAKING SENSE OF TRENDS AND SIGNALS - FACILITATORS

3. Group Reflection (15 minutes)

Using the key themes identified in step 2, have participants consider the following:

- **Which trends or signals represent the best opportunities for our library or institution?**
Where could we lead, experiment, or create value?
- **Which trends or signals represent potential threats to our mission, role, or well-being?**
What might undermine trust, sustainability, relevance, or equity?
- **How are these trends affecting our users?**
Researchers, students, faculty, policymakers, communities—who is impacted, and how?
- **Which of these trends or factors are interdependent or linked?**
Where are reinforcing feedback loops, cascading effects, or systemic connections?

4. Full Group Synthesis (10–15 minutes)

Facilitator gathers group outputs on a board or slide and prompts discussion:

- Which patterns are showing up across groups?
- Are there any tensions or contradictions?
- Are we missing any obvious blind spots?

Use this moment to surface 5–7 key themes that will be most useful in the next chapter.