

7 An extended Futures Literacy process

Design lessons from measuring wellbeing

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This chapter provides another example of the kind of tools or heuristics that can be deployed in designing and implementing Futures Literacy Labs and other collective intelligence knowledge creation processes. In late 2013 a two-year collective intelligence knowledge creation process began in Frankfurt am Main, Germany, under the title ‘Schöne Aussichten – Forum für Frankfurt’ (*Positive Futures – Forum for Frankfurt*). The process used four core elements: dialogue, visions, indicators and actions. Indicators were published in mid-2015 (Bergheim, 2015). It was an experiment influenced by the global wellbeing movement and with plenty of room for the emergence of new insights and actions. The future was integrated explicitly in this knowledge creation process by asking about changes that citizens would like to see in the future and by formulating visions for the year 2030.

One of the salient conclusions from this process is that appropriately modified versions can be used in rich and poor countries at the public or private, local, regional or national levels or for smaller sub-topics or constituencies. The outcomes from the process extend well beyond the pinning down of visions and indicators as tools for planning.

The global wellbeing movement

Collective intelligence knowledge creation processes can be used to improve the wellbeing of societies. There are some linkages to the global movement on measuring and fostering the wellbeing of societies, which has been developing since the early 2000s. Initially, this was highly expert-driven, but more and more elements of collective intelligence knowledge creation processes are being added to this movement. *Positive Futures* provides a bridge between compatible approaches and paradigms: first, by using wellbeing and the future together and second, by combining expert knowledge and participatory approaches. The expectation was that this would allow the creation of new and useful results.

In the wellbeing sphere, the Organization for Economic Cooperation and Development (OECD) took a lead and organized several World Forums on Statistics, Knowledge and Policy. It recognized that standard indicators such as Gross Domestic Product do not provide a complete picture of wellbeing

(Bergheim, 2006). In 2011 the OECD changed its official claim to ‘Better policies for better lives’ and published the first ‘Better Life Index’, one of the most widely used indicator systems (OECD, no date).

Meanwhile, many national projects enhanced the capacity to understand and improve wellbeing. The Australian Bureau of Statistics was one of the front-runners, publishing the first edition of its *Measures of Australia’s Progress* in 2002 (Australian Bureau of Statistics, 2002). In Canada, an academic-led process started in 2004 and developed the Canadian Index of Wellbeing (University of Waterloo, 2016). In France, President Sarkozy established a high-level commission on the Measurement of Economic Performance and Social Progress in 2008, which published its report in late 2009 (Stiglitz, Sen and Fitoussi, 2009). Bhutan developed its Gross National Happiness Index with the help of western academics starting in 2010 (Centre for Bhutan Studies and GNH, 2017). In Germany, several wellbeing measures were constructed, such as the Progress Index (Bergheim, 2010) published by the Center for Societal Progress.

Initially, these projects were driven mostly by statisticians or advocacy organizations with sometimes strong worldviews and had almost no participatory elements. However, questions came up regarding the representativeness, legitimacy and impact of these efforts, so attention turned to ways of involving the public and political decision makers. The idea behind this move towards collective intelligence knowledge creation was to provide a stronger anchoring of visions and indicators, but also to include the potential to create new knowledge and insights (Hall and Rickard, 2013).

Successful participatory wellbeing processes are most advanced at the local and regional levels and in Anglo-Saxon countries. Examples include *Vital Signs* (Vancouver Foundation, 2016), Scotland’s *Humankind Index* (Walker *et al.*, 2012) and the now discontinued projects, Jacksonville Indicators and Tasmania Together. They all include elements of dialogue, visions, indicators and actions. They use the future explicitly and are models for the Frankfurt process.

The first attempt to do something similar at the national level was the UK’s national wellbeing dialogue, which began in late 2010 (Evans, 2011). Widespread participation was used to create an admirable set of indicators. However, national policymakers did not use the insights as much as was initially hoped for.

Following proposals from the author of this chapter and using insights from the processes just mentioned, the German federal government began its own national wellbeing dialogue in early 2015. Indicators were published in late 2016 (The Federal Government, 2016). The hope is that this structured process will strengthen society’s capacity to address cross-cutting issues, that new emerging topics will be identified and that more resources will be directed towards what Germans find important and where the indicators suggest there is a particular need for action.

So, what is wellbeing? It describes the general subjective and objective condition of an individual or a group. Measurement is usually multidimensional. The OECD’s Better Life Index includes 24 indicators from 11 topics covering housing, income, jobs, community, education, environment, civic engagement, health,

life satisfaction, safety and work-life balance. Other projects at the national and local level mentioned above cover similar topics.

Positive Futures – Forum for Frankfurt: general setup

From the experience of successful local wellbeing processes in other countries and using insights from the change management literature (e.g. Kahane 2012) *Positive Futures – Forum for Frankfurt* was developed. The process was led and coordinated by the non-profit think tank Center for Societal Progress. There was no mandate or funding from the city administration. The process was implemented by a team of volunteers with different experiences ranging from process design, networking, analysis and web-design all the way to writing. The shared task and purpose was to discover and implement new ways to improve the future of their hometown. The design of the process included four core elements (Bergheim, 2015) as shown in Figure 7.1 and described below.

Element 1 – Dialogue: An open dialogue on wellbeing with as many citizens from highly diverse backgrounds as possible was the starting point in *Positive Futures*. The team visited people in their neighbourhoods and held larger events. By asking open questions, listening and asking deeper, the hope was to reach three goals: (1) detect societal patterns including those that are not so visible in current media reports; (2) anchor the whole process within society; and (3) build legitimacy for the outcomes of the later stages.

Element 2 – Visions: The richness of hundreds of answers to our questions (outlined below) was structured into 10 topics. The team created short visions as easy-to-understand summaries of what people said about the Frankfurt in which they would like to live in the year 2030. The hope was that ambitious but realistic shared visions would generate energy to make them real. The visions were formulated in a very general way, knowing that indicators would not be able to cover their full breadth. A first draft of the visions was reviewed and revised at an event with 100 participants.

Element 3 – Indicators: Wellbeing indicators are necessary to compare the preferred future situation with today's reality and identify priorities for action. Identifying the five best indicators for each of the 10 topics was a time-consuming effort, but produced valuable results such as the share of youth binge-drinking or neighbourly help. It was clear from the outset however, that not everyone likes to use indicators. Some people distrust all data, especially if (mis)used as policy objectives. Others have difficulties understanding and interpreting them. As a result, some people moved straight to actions, which was always a possibility as the process in Figure 7.1 illustrates.

Element 4 – Actions: Clear priorities for action emerged during the process where it became clear that living together peacefully and respectfully is the overarching

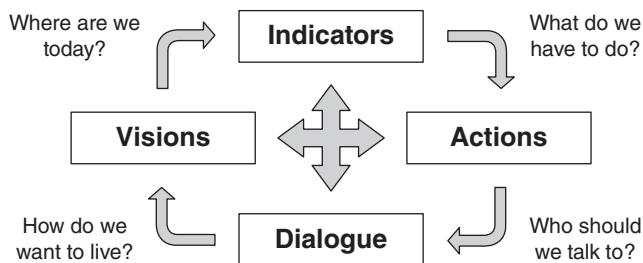


Figure 7.1 Four elements of a quality of life process

Source: Center for Societal Progress, Frankfurt

concern of citizens in Frankfurt. This was later confirmed by the indicators on trust, integration, safety etc. The energy within the team therefore turned to projects that improve the quality of living together: neighbour parties, living room travels¹ and repair cafes. As a small non-profit NGO, our own actions necessarily had to be inexpensive. The hope was that other, better funded organizations and the local government would set their own priorities for actions in the future more in line with the visions and the indicators. There are now some signs of this in the areas of littering in public spaces and traffic noise – both areas that were flagged as priorities by the indicator system.

The design of the process with four core elements was expected to generate at least four valuable outcomes that could serve as enablers of societal change.

- 1 **Empowerment of individuals:** the capacity of people to think about the future and act accordingly was strengthened in the process. This happened during the dialogue phase, when individuals felt encouraged or motivated to act in order to improve one of the issues they thought was important for their quality of life. Since we were not a resource-rich institution, they could not ask us for help beyond giving some advice. In addition, the actions that emerged also have elements of empowerment, again partly because of financial restrictions. We encouraged people to connect with their neighbours; we facilitated intercultural exchange during the ‘living room travels’ and we supported them in setting up repair cafes.
- 2 **Enable new relationships:** during the process, we offered multiple occasions for people from different backgrounds to meet and connect. This ranged from two large events, where participants self-selected into thematic groups, to small events, where leaders from different organizations connected. Several new relationships led to new, co-created projects outside the core team or sometimes even outside the core intention of *Positive Futures*.
- 3 **Uncover relevant insights:** the events, the visions and the indicators all brought new insights to almost everyone involved. People may have been familiar with some aspects or indicators, but were surprised by others and by the connections across the 10 content topics. For example, links emerged

between drug abuse among youth and the pressure they experience at school and at home.

- 4 **Update the societal narrative:** the dominant societal narrative in Frankfurt has been that more growth of inhabitants, income and activity is always better. During the process, it became clear that many of the current 700,000 inhabitants suffer from this growth because of increasing anonymity, human disconnection and because of bottlenecks in the traffic infrastructure, in schools and most visibly in housing.

The sponsors of this experiment in collective intelligence knowledge creation were satisfied by the content and connections that emerged. However, no formal evaluation of the process has been conducted and only a small fraction of the 700,000 citizens of Frankfurt has been reached.

Eight design decisions in Positive Futures

Within the general setup of dialogue, visions, indicators and actions, many more design decisions had to be taken. Eight examples highlight our choices as well as other possibilities and their probable consequences. Each example finishes with an attempt at generalizing the implications for collective intelligence knowledge creation processes.

- 1 **Institutional setup:** for several reasons, we chose to host the process with the small non-profit NGO Center for Societal Progress and to run it as a volunteer project. The main advantage was the Center's competencies with respect to such a process and its neutrality on content. Funding for such a cross-cutting process was not available in 2013 and no other private or governmental organization was ready to act as a host and/or fund the process. Additionally, starting a new organization was seen as too time consuming. After an attempt with a steering group did not lead to sufficient activity, the Director of the Center for Societal Progress (author of this chapter) contacted a number of action-oriented team members and took the lead in the process. The general insight is that an ideal institutional setup for such a collective intelligence process is difficult to find. Compromises have to be made regarding openness on content, the power to attract participation, funding and team size.
- 2 **Language and illustration:** from the beginning, we aimed for an easy-to-understand language and were aware that illustrations and pictures were crucial to reach a large number of people in Frankfurt. However, at the same time we had to show that the process was a professional and serious activity. Ideally, a spectrum of audience-specific approaches should have been used, ranging from videos and games, postcards and flyers all the way to thick and text-heavy publications. Given limits of time and money, we opted for a single compromise solution.
- 3 **Questions and content:** from the international wellbeing processes mentioned above it was clear that the Frankfurt process needed to be open

regarding content, and that team members should not impose their own values and priorities on that content. This general principle led some to leave the team or to take on roles that were more in line with their own values. Consistent with the openness on content, four open questions were selected, moving from the personal to the societal level and from the present to the future: What's important to you personally in your life? What constitutes a high quality of life in Frankfurt? What hurts you in the heart, when you think about Frankfurt? Frankfurt in 15 years: which changes would you like to see? Any collective intelligence process is likely to face these issues on questions and on openness.

- 4 **People involved:** within the core team a broad spectrum of competencies was needed, including trained facilitators, design experts, networkers and data experts. For the dialogues, we made a conscious effort to reach out to the seldom heard voices and visited youth clubs, a home for the elderly, immigrant communities, long-term unemployed, single parents etc. The aim was to achieve a high diversity of backgrounds and perspectives – going well beyond the largely white and university-trained core team – without requiring a statistically accurate representative sample. To get there, we had to tap into the networks of the core team and explored personal and business contacts for different groups. Two groups rejected our approaches, apparently because they thought the project was too supportive of the current systems of governance. Our large events twice drew 100 people with a strong bias towards middle-aged white academics. We also spoke bilaterally about the process with many key decision makers in Frankfurt across the 10 topics, who would not usually participate in bigger events. These people included representatives from the main political parties, the administration, as well as individuals with large networks or special expertise. Our attempts for online interaction did not generate much response. The general insight is that a very large number of people should be involved in such a broad collective intelligence process through a variety of different approaches. Organizing this is time consuming.
- 5 **Marketing and visibility:** from the start, it was clear that it would be difficult to generate visibility for such a new process which is so open on content and run by a small team of volunteers. Experts from the fields of marketing and communications found it difficult to formulate a clear message that they thought would resonate with the media. Bilateral media-contacts generated positive feedback but little concrete results. The general insight is that such an open collective intelligence process is – at least in Germany and run by a small NGO – not easily marketable. But more visibility clearly would have been helpful both in the initial dialogue phase and in the marketing of the results and the action projects. Maybe this would have attracted more participants and more volunteers into the process, with the hope of making a bigger difference to quality of life in Frankfurt. Also, change takes time and persistence: two significant press reports about the process came out in 2016, well after the indicators were published.

- 6 **Design of the visions:** based partly on earlier research on successful visioning processes (Bergheim, 2013), we decided that the visions should be for the city of Frankfurt (as opposed to the region or one city district), for the year 2030 (well beyond one electoral period), short (it turned out that even the short text was too long), positive (generating a motivating feel-good factor) and posing a real challenge to society without turning into a utopia. While writing the visions, we struggled, for example, with the issue of combining a clear general direction with enough freedom for each individual. For example, we did not write that people in 2030 would eat ‘healthily’, but rather ‘consciously’.
- 7 **Choice of indicators:** clear selection criteria for the indicators were developed during the process and in light of other research (Trewin and Hall, 2010). Ideally, the indicators had to be compatible with the visions, outcome-oriented, have a clear preferred direction of change, be modifiable by human activities, understandable by the public, cover the breadth of the visions, be available in real time and ideally as time series. In practice, many compromises were necessary and we even opted for place-holders in case of relevant and feasible indicators, for which no numbers were yet available for Frankfurt. Supporting collective intelligence knowledge creation with indicators appears to be helpful, but one needs to be aware of the limitations. Although there is a common core of indicators in many wellbeing projects, there always will be specific local topics as well as specific local weights and urgencies on comparable topics.
- 8 **Emergence of actions:** actions emerged during the whole process. Some came up already during the dialogues, others during research and conversations on the material generated during the dialogues. For example, a dialogue participant told us of her neighbourhood festivity and the motivations behind it. This resonated strongly with what we had heard in other dialogues, so we supported her in spreading the idea. Another example includes a team-member researching activities that can promote the quality of living together. She discovered the ‘living room travels’ in another city. At our second large event, we found volunteers who then brought these travels to Frankfurt. During the overall process, we developed criteria for actions that would be supported by the team of Positive Futures: they would have to be compatible with the visions, ideally help improve at least one indicator and should be possible to implement across Frankfurt.

Mostly because of scarce resources of time and money, but also in the interest of limiting the size of the overall process, other design options were not discussed during the process. Some more reframing might have been useful to enhance collective knowledge creation. In particular, we stayed with one vision for each topic, knowing that this was a limiting decision. We could have run a scenario workshop to open up the thinking even more. This could have created valuable insights to make the visions more robust and to include indicators relevant in the non-preferred futures.

Seven challenges for Positive Futures

While the overall process of ‘dialogue – visions – indicators – actions’ proved to be valuable and created many new insights, some general restrictions and challenges for collective intelligence knowledge creation processes became visible.

- Some people see no need and no legitimacy for a citizen-led process to discuss societal priorities in the current form of representative democracy. However, we see quality of life processes as a much-needed addition to representative democracy to give room for new and specific insights generated from the interaction of different individuals. They also promote citizens’ self-empowerment.
- There was also an urge to opt for simpler processes and for more narrow issues. We appreciate this urge, but also think that complex modern societies exhibit many attributes and interlinkages, which are not appreciated and explored enough.
- Others wanted to jump straight to action. This was widespread in the process and easy to understand. However, we see the search process to generate visions and indicators as providing a potentially wider and more solid basis for the choice of actions, given scarce resources of time and money.
- During the large events, participants showed different levels of abstraction. While some wanted to discuss more philosophical issues of society, others wanted to learn what they could do themselves the next day to improve the situation of Frankfurt.
- There was also the well-known impulse to turn to experts for answers. Indeed, expert knowledge was helpful in the process at many stages. But it has to be closely linked to what citizens see as important and to their own role as change agents. And it is well-known that experts are not necessarily the best source for help in complex systems. Rather, participants’ capacity to understand their complex environment has to be enhanced as well as their ability to act in it.
- The organizational silos and hierarchies with their roles and expectations limit the potential for individuals to engage in such an open process. We nevertheless see the need and the potential for dialogue and for capacity building. This is a way to improve people’s ability to use the future in order to act in the present.
- Many actors have their own projects, which they want to or have to push in this process. We appreciate the efforts of all these actors, but also allow the possibility that some projects turn out to be less helpful than others in a quality of life process – independent of the strength of the voices behind them. Furthermore, we wanted to provide room for experimentation and for the emergence of new projects.

Summary

Despite several challenges and limitations, this two-year collective intelligence knowledge creation process was worth the effort. Using the future was

particularly effective at helping to create shared meaning, new insights and new relationships that can enhance wellbeing. Visions provide a positive picture of the future. Indicators help improve the basis for making decisions regarding scarce resources of time and money. Action projects are helping to move Frankfurt in the desired direction. This four-step process is more time consuming and more costly than traditional methods of desk research or panel discussions. However, the benefits outlined above outweigh those costs. We hope that the insights and background provided here and in our manual (Bergheim, 2015) encourage others to share their own insights on similar processes and provide an impulse for newly emerging processes at the corporate, local, regional or national levels.

Note

1 In German this is called *Weltreise durch Wohnzimmer*. A person who is not born in Germany (the ‘travel guide’) opens their living room for about two hours for a group of up to 10 people (the ‘travellers’) and tells them something about his/her country of origin. This way travellers learn about different cultures without having to travel to distant places.

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