Speaking Notes
Webinar for the Ontario Association of Art Galleries and the Ontario Museums Association
14 July 2020

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	After the panelists introduce themselves	Process we followed: We met on four successive Fridays for about an hour each time. We went through one of the steps each time. We sent notes from each of the calls back to the participants, and provided them with an agenda for the next call. This meant that everyone put some thought into what would be discussed and made the conversations very interesting and productive. The participants then accepted the role of presenting the final matrices, and spent some time discussing their task and preparing their notes. We are immensely grateful to Janis, Demetra, Brian and Alex for their contributions to this webinar.

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7	Section head Scenarios	Planning always requires a bit of futurism. Those of you who remember the 70s will remember that predicting the future was quite an industry. Whether it was how technology was going to evolve, or what the price of oil was going to be, or what the role of women would be in the workforce, or what would happen if there was a nuclear meltdown, many people tried to predict what was going to happen. The job for everyone else was to think about how to respond to those changes – including whether to take them as serious possibilities or not. Clearly, hiding under a rock wouldn't work.
8	And thinking long-term	So most of us, without putting a lot of effort into it, decided how to move forward. To get an education, to buy a smaller car. But at least one company, starting in the 60s actually, made a discipline of imagining what could happen if really major changes occurred, and making contingency

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9	Strategic planning vs scenario building	As we're talking about planning, I want to make clear that scenarios are different from strategic planning. When you do your regular strategic planning, you are typically working with a 3-5 year horizon. There are still going to be surprises, but you can be reasonably confident about where you're going and how you'll get there. Scenarios help you think differently about a longer time horizon. You and your organization will confront possibilities that may require a radical re-think of your mission, your audiences, your services. Risk management is at the root of why we look at scenarios: what is out there that we have never thought about? What would we do differently if we did know about it? And by the way, that can be a huge opportunity as well as a risk. Once you have the scenarios, you can move toward strategic planning, of course.

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10	Steps in Scenario Building	So now we will look at how to build scenarios. [Make note of the 4 steps]

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11 - 16	But first: assess the current situation	Whenever you are looking to the future and how to get there, you have to start with where you are now. You have all been forced into thinking about this over the last four months, as you shut your operations in the crisis, and then thought carefully about how to shift online and re-open your facilities to the public. At our first meeting with the participants, Demetra suggested that we provide some basic data on the sector. NEXT SLIDE So for today's purposes, we have pulled together some basic information as a reminder about the differences between galleries and museums, as well as some of the similarities. In these slides, which we can share afterward, you can see where each sector's 'unearned' income comes from – different levels of government, different types of donations – and where your 'earned' income comes from. Each of your organizations will be unique in how your finance yourselves.

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17-19 20	Step 1 – Identify the factors that drive your organization	So the first step in scenario building is to focus on the factors that contribute to or influence your business model the most. That is, why do you do what you do, and how. I will summarize discussions the panelists had as they identified four driving factors. We all agree that there are more, however, these are the ones we settled on to use for this project. The panelists can provide additional remarks, comments. [NOTE TO SELF: Move through the slides as you speak.] Society Demographics, neighbours, how we treat each other. Obviously, we were holding these conversations in the context on the one hand of a pandemic, which encouraged people to look after one another, and social upheaval over the way racism has been reinforced by policing.

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24	Questions	Over to KW
25-26	Step 2 - Create the Continua	Let's take those factors and imagine would could happen at the extremes. Not just what's happening right now, or in the foreseeable future, but dramatic, radical, long-term change.

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27	The factors as continua	Your colleagues took the four factors and considered what could happen in each one. For **Society**, they described the ends as a Fractured Society, in which there is a breakdown of social relationships, there is a lack of trust, there is systemic racism, there is inequality. On the other side, a Healthy Society is one in which there is equity, people like each other, they are well educated, they support and enjoy the arts, people help each other out when needed. When there is civil unrest, or worse, the implications for a collection could be severe, as was discovered during WWII. Some of you may already have a plan for that. For **Economy**, we can imagine that a prolonged downturn could lead to a long recession, with unemployment, increased poverty, lower government revenues. At the other end, sustained growth could bring increasing budgets, investments in people and infrastructure, rising

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28	Implications	Once you have figured out the polarities, you can start to think about the implications of these possible changes on your activities.
29	Example: prolonged recession	We do this by asking questions, to which we don't have immediate answers. Of course, you may have information sources or experts who can reduce the uncertainty of these questions, but for the most part, we ask questions that have no answers right now.

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30-32 33 34 - 36	Step 3: Creating a matrix (choose two factors and describe the scenarios)	One of the reasons we can't answer our questions is that the world is more complicated than that. CHANGE SLIDE To every action there is an equal and opposite reaction. And a change in one factor can have a significant impact on the direction of change of another factor. CHANGE SLIDE So now we choose two of the factors and start to see how they interact. The panelists proposed two different sets of factors to work with. This is, by necessity, a simplified approach. If you had time, brain space and computing power, you might consider how all of these interact, and how things might evolve over time. I'm going to ask Janis Monture and Alex Gates to present the first matrix – Janis, would you like to start by telling us why you chose to put these two factors together?

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40-41	Step 4: Choosing a base case	Janis and Brian each chose one of the quadrants as a 'most likely' scenario, while Alex and Demetra presented other scenarios. You'll also notice that there are actually six possible matrices when you start with four factors. The group chose these two because they made the most sense to them, but it's a good exercise to see what else can happen. What happens when fractured society meets social isolation? What happens when economy meets infrastructure? Some of these could happen, but the impact on your institutions or sector may or may not be significant. When you are doing this, choose the matrix and the quadrant that are Most relevant and Most likely To use as your 'base case' for planning

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42	List of things to think about	Then you can really start to examine the implications that the scenario would have on your operations. You've already heard your colleagues address some of these in their comments. Your particular organization may want to look at other aspects. So what is the point of asking all of these questions? Certainly we can be optimistic, or we can be nervous about what we observe.
43-44	However you think about the future…	You can plan for it

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45-46	Using scenarios to make plans	Use the scenarios, and especially the process to develop the scenarios, when you need to have a deep conversation with your Board and professional team. Use them when you are facing a completely unpredictable world – like right now. Use them when you need to think far into the future, when you are planning a new facility, for example, or starting a new institution. Use them to shake up stale thinking, when people have grown complacent and think everything will continue as it always has.

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47	Starting the planning conversation	Ultimately, you will still want to get to a Vision, and Goals, and Strategies, that you can have confidence in. As you gather more information and answer more of the questions you raised, you will start to feel more certainty about what the future could hold, and you can plan accordingly.
48	Participants?	Invite participants to talk about how they will use scenarios with their organizations.
49	Questions	KW
	SUMMARY	Summarize the steps (refer back to slide 10) Conclusions Ask ‘what if?’ Invest the time when there’s a lot at stake The process can be time-consuming, but we hope you also find that it inspires creativity and helps you to have great discussions about how to lead your organization into the future.

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50		Resources
		Thanks.