

Backcasting an Initiative Roadmap

Sitting at a computer to plan out a roadmap for your initiative is boring. Crowdsourcing a roadmap with everyone in the room in 15 minutes is fun AND it builds ownership of the work. Why choose a boring and isolated approach over one that's fun and interactive?

Backcasting begins with today (whenever today is) and end with a key milestone at a future date, such as a pilot project that we want to complete within 6 months.

The template for backcasting is a blank wall or long sheet of paper with Post-its for key dates. For example, if we have until December 1 to get a pilot project done, we might put the following Post-its along the top of the work area:

TODAY	3/1	4/1	5/1	7/1	9/1	11/1	12/1
-------	-----	-----	-----	-----	-----	------	------

Notice that we leave more room in the early part of the timeline. That's because groups always identify more tasks for the near-term than for the long-term.

One you have the template on the wall, here are the types of instructions you might give to the group:

1. "This timeline runs from now until December of this year. We're going to crowdsource a roadmap (or workplan) for our initiative together on this timeline.
2. "Let's first agree on what we would like to be able to deliver by the next network meeting in December. Put that objective under the 12/1 post-it.
3. "Now let's work silently for a few minutes. Each of you generate any tasks or milestones that need to be done between now and December and put them on the timeline where you think they belong. As you add your items, see how they fit with what others have put up there.
4. "Great! Now let's organize things. First, what are our key milestones between now and December? Okay, now, are there natural streams of work here, like pilot participant engagement or materials development? Now let's order and add tasks logically—for example, in order to send out this survey out, we'll need to draft the survey.

Here are common backcasting prompts we use to help people think of what types of tasks to add (the prompts will vary by the type of project). We sometimes write these on a list or print them on cards for participants to use as prompts.

- Engaging Users
- Communications
- Stakeholder Engagement
- Materials Development
- Pre-testing
- Engaging Partners
- Survey Development/Testing
- Providing Guidance to Users/Participants
- Testing
- Supporting Pilot Participants
- Engaging Workers/Parents/Other
- Resourcing/Funding
- Language Translation
- Gathering Feedback
- Measuring Impact
- Learning
- Mitigating/Managing Risk

A Simple, 6-month Backcasting Exercise



An 8-year Backcasting Exercise

