Evergreen IV – Year One Summary

Evergreen is a continuous cycle of strategic renewal and informs strategy development. It remains founded on the premise that Coast Guard leaders must periodically break away from their day-to-day activities and create strategic intent in order to best prepare the Service for the uncertainties of the future. Using a scenario-based planning process, *Evergreen* looks toward the horizon and beyond to identify strategic needs required by the Coast Guard to meet the demands of a highly dynamic and constantly evolving operating environment.

Evergreen IV is the 5th iteration of Evergreen and started in October 2013. At the end of the first year, we completed two phases with three more phases that will take place over the next three years:

- ✓ Phase I: **Reflection** – Examined Evergreen III materials, processes and identified lessons learned with recommendations for improvements.
- ✓ Phase II: **Discovery** – Focused on strategic scenario driver identification and documented the expected prevailing factors that will influence future worlds.
- Phase III: **Refinement** –Scenario and strategic needs development.
- Phase IV: **Operationalization** – Translating conceptual ideas to operational procedures or actions by articulating actionable and usable Strategic Needs.
- Phase V: **Application** – Application of new Evergreen Strategic Needs through synthesis and customization of Evergreen products.

Identifying Drivers and Trends

Phase II: Discovery was focused on conducting research, interviews and workshops to identify future Drivers and Trends. Drivers and Trends are factors that will decide the nature of the future environment within which the organization operates.

To support this, the Core Team developed a collection of white papers that provided an overview description of a given topic area and a collection of subtopic descriptions focused on the future and how the future may be different than today. Five topic areas were identified and the whitepapers developed under the lead of a Core Team member:

- **Environmental Influence** – CDR Eric Popiel
- **Governance** – LCDR Kevin Duffy
- **Homeland Security & National Defense** –LCDR William Friday
- **Infrastructure & Resources** – MKCM Edward Lewis
- **Technology** – CDR Nicholas Wong.

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Sub-topics within the white papers were captured in over 120 Insight Cards. An Insight Card is a single-sided card with a concise future concept along with a compelling title

and picture. The Insight Cards were used in several workshops as provocative thought pieces to stimulate discussion and immerse participants in the future.

This research also initiated the Drivers and Trends Inventory with over 300 factors influencing the future categorized and used to support the identification of high-level Drivers and Trends and dimensions used to shape future worlds.

External Stakeholder Workshops

The Evergreen team conducted two 2-day workshops at Coast Guard Headquarters to gather external perspectives on key trends, driving forces, and challenges on the future operating environment. We also gained critical feedback and input on previous Evergreen III scenarios. Over 200 experts from across the maritime industry, other federal and state agencies, academia, and think tanks were contacted. The workshops included participants with different backgrounds, including think tanks, academia, private sector, other government agencies, as well as participation from the Core Team. A remarkable group of 40 experts donated their time to support the

RDML McAllister addresses External Stakeholders. Core Team Members participating the two meetings include Andrew Troy, CDR Andrew Russell, CDR Nick Wong, LCDR Ben Goff, LCDR Zack Ford, CAPT Gary Jones, CDR Dana Reid, CDR Tyson Weinert, LCDR Andy Howell, LCDR Bill Friday, LCDR Eric Popiel, LCDR Todd Raybon, MKCM Ed Lewis

Evergreen Program. Participation from a Chinese citizen conducting pre-doctoral research provided a very unique perspective on topics discussed during the first meeting. The identified drivers and trends from both workshops served as inputs to create dimensions and develop future scenarios.

The objectives of the external included the following:
- Gain external stakeholder perspective;
- Identify potential collaboration and coordination opportunities; and
- Communicate the Evergreen process.

Stakeholders who could not attend workshops due to scheduling conflicts and logistical issues were interviewed to gain additional perspectives on future drivers and trends.
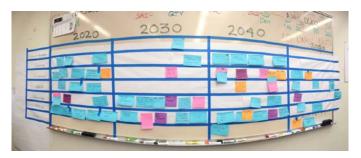
Phase I Interviews

The Evergreen team conducted interviews with senior leadership and participants of previous Evergreen iterations in order to gather additional thoughts on future drivers, trends, and lessons learned. Close to 20 interviews were held with support from Core Team members. From the interviews, a Lessons Learned Assessment was compiled. Hundreds of observations captured during the interviews were distilled down to findings, conclusions and recommendations on enhancing the Evergreen program and its application throughout the Coast Guard.

Knowledge Transfer Workshops

Three Knowledge Transfer Workshops (KTW) were conducted with operational Coast Guard units at Air Station Clearwater (Clearwater, FL), Training Center Petaluma (Petaluma, CA), and Pacific Area (Alameda, CA). The objective of each KTW was to achieve the following:
- Extend knowledge of the Evergreen program throughout the Coast Guard;
- Expand efforts to instill future thinking and strategic intent in the culture of the Coast Guard; and
- Obtain additional perspectives of future drivers and trends.

Dimension Creation and Scenario Development

The drivers and trends identified during the interviews and workshops were distilled into seven dimensions used to create the initial set of future worlds. The dimensions identified were:
- International Stability and Cooperation
- National Stability and the Role of Government
- Population Shift and Demographics
- Influence of Technology
- Resource Availability
- Global Order and Policy Dynamics
- Environmental Change and Adaptation.

New Core Team members joined in a three-day offsite to draft the Scenario Descriptions for the future worlds. Additional perspectives in the development of the scenarios included Scott Fields of the R&D Center, LCDR Doug Salik from the Marine Safety Detachment Nashville, CDR Suzanne Stokes from PACAREA, and Mr. Steve Tucker from CG-MLE-4 Protected Resources.

Core Team Members Select and Draft Initial Scenarios

Taking the extremes of the dimensions, the Core Team created scenarios that fit the description of the intersection of two paired dimensions. A selection process was carried out to finally settle on and develop Scenario Descriptions for 10 plausible future worlds.

Way Ahead

Based on these 10 candidate scenarios, Coast Guard leadership was asked to select four or five scenarios that, together, would cover the range of opportunities and challenges the Cost Guard could plausibly expect to operate in the future. Then the selected scenarios will be refined and completely built out prior to our first workshop scheduled for April 2015. Future planned workshops will include mid- and senior-grade officers from across the Service.

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Additional information on the Evergreen Program is available from Core Team representatives. A roster of all Core Team members is posted on www.uscg.mil/strategy/evergreen.asp