

# The Search Conference Method for Participative Planning

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The Search Conference is a participative planning method that enables people to create a plan for the most desirable future of their community or organisation, a plan they take responsibility for carrying out themselves.

In a Search Conference, people (citizens, community leaders, managers, workers) become a planning community. Together they create a plan for the future, based on shared human ideals, that they can live for and work to implement. The Search Conference makes it possible for any kind of system, whether community or workplace, to thrive in the face of uncertain, turbulent times.

The Search Conference has been used around the world for more than 30 year. Fred Emery and Eric Trist introduced the first Search Conference in 1959 to merge two aircraft engine manufacturers in Great Britain. Fred and Merrelyn Emery have continued to research and develop the method ever since. The Search Conferences has become popular in the USA in recent years with successful applications in business, communities, and government.

## **Purposes and Types of Search Conferences**

The Search Conference is useful for setting new policy directions, and strategies in any sector, public or private; for finding common ground on difficult social conflicts; for developing or reforming communities, organisations, or industries. It works for any system coming together around a common purpose and looking for a desirable future.

The Search Conference brings to life the concept called open systems, suggesting that any system has an open and direct relationship with its larger social environment. We use the term system to mean any organisation, community or network that draws a boundary around itself to establish its relationship to its environment. Environment means everything outside the system. It includes all the aspects of global society that are changing so fast, as well as those things that are unchanging such as: increasing global economic development, population growth, and communications superhighway, to name a few.

The method is ideal for the following systems:

- Communities and regions wanting to bring together people with diverse, often conflicting, perspectives concerning complex social issues, such as the environment, education, or social services, to build a new future.
- Organisations, private companies or public agencies, needing to develop a new strategy, direction, and actions people are committed to carrying out together.
- Multiple organisations wanting to develop a plan for merging their business strategies or integrating their service delivery.
- Networks, organisations, or institutes that need to be built from scratch to deal with issues in the changing environment.

The following are only a few examples of the power of the Search Conference method. They illustrate the scope of the Search Conference from regional planning to planning on important social and environmental issues, and to strategic planning for any organisation.

In Nebraska mental health professionals, consumers, and political leaders develop integrated plan for their state's mental health delivery system that they are implementing themselves. The new system is consumer based, locally driven, and supported by a new state mental health institute. These results came from a series of three Search Conferences on the future of mental health.

At Hewlett-Packard, one manufacturing plant used the Search Conference method to renew its business by bringing together leaders from the organisation to collaborate on a thorough strategic plan, including decisions about key business strategies. Another HP plant did a Search Conference to develop a plan for empowering its workforce. This Search Conference led to several new strategies including implementation of self managing groups.

In the Macatawa region of Michigan, citizens and community leaders used a Search Conference to develop a comprehensive plan for the future of their region. The plan included specific, concrete strategies on transportation, education, and economic development. After the Search Conference, the participants are continuing to work on implementation of the plan. The regional council adopted the plan as its official strategic plan and based its organisational structure on the strategies.

In Colorado, the governor called together water engineers from the front range communities of the Rocky Mountains to cooperate on the use of scarce water resources in this semi-mid region. The history of deep conflict and litigation over water resources goes back more than one hundred years in the state. The engineers came up with a plan that would for the first time ever make it possible for their communities to share water resources. At the conference they organised themselves into temporary network organisation to implement the plan.

## **What Happens in a Search Conference?**

*Search Conferences are increasingly popular because they hold out the promise of commitment to and collective action towards agreed goals, directions, and change. Merrelyn Emery*

20-50 people from the system (leaders of the organisation or people from the community) participate based on their knowledge of the system, diverse perspectives, and potential for implementing the plan they develop. Participants attend not as representatives of stakeholder groups, but because of their importance to the conference task. The idea is to get the right people in the room, those whose presence is critical for doing the job right. Once in the room, people become a community of planners.

When we use the word participative in the Search Conference, we are going beyond the way people often use the word. The Search Conference is not about a group giving input to higher up authorities or others who are responsible for planning. Participation, here, means the group actually develops and carries out the plan. That's why it is important to keep the number of participants at a level where real community can emerge.

The Search Conference is not the usual visioning process that has been so trendy over the years. We constantly encounter organisations and communities that have produced creative, abstract vision statements that are framed on the wall and go nowhere. The Search Conference,

on the other hand, rivets people's attention on real action based on a future the group decides to make happen.

The conference is normally two days and two nights, preferably off-site. People immerse themselves in a social island setting in which they form new relationships and commitments. At the conference people work together mostly as a large conference community, with some small groups for specific tasks. We call it searching because the conference community searches through their external environment and system, collecting, analysing and synthesising data. In this process, people simultaneously learn and plan together.

The Search Conference is designed to provide a learning environment in which participation is equal and open regardless of hierarchy or position. People's words are spoken out loud and recorded on chart paper for all to see. There are no individual workbooks or private note taking as the emphasis is on restoring oral culture and discussion.

The Search Conference has no presenters, lectures, speeches, keynote addresses, games, or training sessions. There is nothing to make it look as if people are in a training workshop or traditional conference. People do not have to perform skits or do guided fantasy visions. And there is no need for people to feel

confused or experience chaos in order for learning or change to occur. There is nothing magical about a Search Conference; it's just people doing real work on important tasks.

People are collectively responsible for tasks and outcomes. Conference managers make sure participants have the best structure and process for their task, providing the best possible learning environment.

The Search Conference is about jigsaw puzzle solving. The focus is on putting the right pieces of strategy together that will produce the desirable future. Puzzle learning is unlike problem solving in that, until each piece is individually located and placed, it is not possible to determine which piece must be found next. In a Search Conference, each person contributes knowledge and expertise about some piece of the overall puzzle.

## **Search Conference Design: The Open Systems Funnel**

*People are purposeful and can, in the appropriate conditions, be ideal seeking. Merrelyn Emery*

The Search Conference resembles a funnel in its design. It begins with the widest possible perspective, outside ourselves and our task, to explore possibilities. Then it narrows to specific key strategies and actions, widening again as the group diffuses and implements its plan back home. The design is essentially the translation of the concept of open systems into a conference learning environment, to make open systems come alive.

In a nutshell, the Search Conference begins with the group learning about its turbulent, uncertain global environment. Next, the group searches through its system's past and present in order to develop the most desirable system. Then they develop strategies and action plans that they will implement.

Roughly one third of the conference time focuses on learning about the turbulent environment. one third on learning about the system and the last third concentrates on action planning.

Every Search Conference is unique, requiring special planning and design. There are no set activities to take off the shelf and dust off for simple use. This is the generic process:

1. Changes in the World Important Into the Future Desirable and Probable Future of the World
2. Our System's History: Where We Came From
3. Our Current System: What to Keep, Drop, and Create
4. Our Most Desirable System
5. Strategies and Actions Plans
6. Community Grows and Diffuses Through Implementation

## **The Process in Detail**

### **Learning about Our Turbulent Environment**

*People want to learn, and want to create and exercise control over their futures Merrelyn Emery*

After a brief opening session to clarify the conference task and agenda, and a session to negotiate expectations for the conference, the search is underway. There are no ice breakers, speeches, lectures or any activities that might suggest that people are about to experience a traditional conference in which someone else is responsible for doing the work.

Changes in the world...Desirable and Probable Futures. The first session has people working as a large community. People voice their perceptions of what has been happening in the world in the past 5-7 years that has struck them as significant. The ground rule is that all perceptions of the environment are valid and are written on chart paper for all to see. The changing world appears before everyone's eyes as the list grows: movement toward a global economy, intensifying environmental problems, expanding global communication and technology, increasing government regulation, increasing empowerment in the workplace. The list goes on and on.

This is an important and exciting session because all the conceptual frameworks of the search conference immediately come into play. People see that their organisation or community exists within a much larger context. People are immediately taking responsibility for their own data, behaving in an open and public manner, beginning to build a planning community of trust. Doing this session as a total community sends the message that the Search Conference is a community building event.

Next, small task groups form to analyse the data. They come to grips with the significance of the changes they have perceived by identifying both the probable and desirable future of the world several years in the future. They discuss what the world will probably look like if global trends continue developing as they are. They also envision their desirable future for the world if we get things right. The groups report their findings and integrate the results into a final community list.

In identifying their desirable future of the world, the conference community is expressing and coming to agreement on their shared human ideals. These ideals will serve as a benchmark for later work on determining the system's most desirable future. Common ideals that tend to emerge in a Search Conference include such desirable futures as: peaceful resolution of differences; increased community participation; respect for human rights; balance between development and environment; community and regional cooperation. Agreement on basic human ideals makes it easier, later in the conference, to agree on specific, concrete strategies that are embedded in these ideals.

The point of starting with the environment is that there is a direct connection between the future direction of any organisation or community and the direction of the larger global environment. This is called directive correlation. The theory suggests that any new state of affairs is jointly determined by both the system and the environment. Many organisations mistakenly believe they need only be aware of their immediate business environment in the planning process. They thereby risk failure to be adaptive in a fast changing world. When system and environment are moving in sync, they have an adaptive relationship.

In corporate and issue oriented searches, another level of environment may need to be included. This is the task environment, those changes just outside the boundary of the system that are having the most immediate effect on the future of the system. Examples from corporate searches include marketing, industry trends, technical innovations, or changes in the larger corporate environment.

## **Learning about Our System**

The next phase has people appreciating their history as a system, analysing the current functioning of the system, and then agreeing on their systems most desirable future.

**Our System's History: Where We Came From.** Surveying the significant historic events and changes is a critical phase for any already existing system, whether organisation, community, industry, or network. Gaining a shared appreciation of where they have come from, what has made the system what it is today, is an important part of the context.

Without this perspective, the group is at risk of designing a future that fails to link past and future.

It is best to do the history session as a large open community discussion, with people telling their own perspective on events they believe shaped their organisation or community. It is good for people to just talk in open large group without any artificial expectations, like identifying decades or time lines. Everyone learns about the continuities that have shaped the system. In a way, the history session restores the kind of oral culture that allows people to celebrate and take pleasure in their common organisational past. The history session becomes a fully participative community building event amplifying the common ground established during the previous phase.

**Our Current System: What to Keep, Drop, and Create.** With both future and past contexts in place, the group enters another analytical phase. Here it builds upon the learning from the history session and should by now have sufficient trust in itself to openly acknowledge the weaknesses as well as strengths of the current state of the system. Rather than narrow this session down to a typical strengths and weaknesses analysis, it is more useful to broaden the analysis. This allows people to continue their learning from the history session. The task is to identify, usually in large group, what about the current functioning of the system to keep, drop, and create. This is a brainstorm with the ground rule that all perceptions are valid. This reinforces confidence in people's direct perceptions and values, and in their openness and democratic functioning.

This process, building on the history session, is just another preparatory step in the mutually supporting processes of building a planning community. At this stage we start using the word community to describe the search conference group.

**Most Desirable System.** People break into small groups that work in parallel on the same task: the most desirable future of the system. There are no imposed ways for the groups to work. The creativity is in the ideas of the groups. The groups manage themselves to come up with lists of concrete points describing the desirable system, as it would look at an agreed upon time in the future. The groups report and integrate their results. Then the entire conference community decides which points to develop into desirable strategic goals.

The process is designed to avoid the lofty vision statements that have led to so much frustration and misunderstanding in organisations. Too often groups create lofty visions that they frame on the wall, but never convert into concrete strategy. The belief that somehow a powerful vision will magically happen has led to deeper levels of cynicism. Our experience is that making our desirable futures happen requires strategy and concrete action planning.

It is important that this session result in an array of desirable future strategies, so as not to put all the emphasis on one overarching theme. It is best not to put all the planning eggs in one basket. The number of strategies selected is up to the group to decide based on what they think they can handle.

## **Action Planning**

What we need now are heroes and heroines, about a million of them; one brave deed is worth a thousand words. Sentiment without action is the ruin of the soul. Edward Abbey

The final third of the Search Conference involves the community in developing their desirable future into specific strategies and action plans. These plans contain a clear agreement on steps for implementing the plan and spreading their learning back home.

The time allotted for this phase should be roughly one third of the total working time of the Search Conference. People agree on a final reporting time. Within that period, groups can choose their own working and resting timetable. They are self managing.

Strategies and Actions. There are several variations, but normally there is enough trust in the community for participants to become self managing. In practice this means that participants self select around strategic goals they want to work on, forming task forces that will develop action plans for that goal on behalf of the whole community.

The components of this session are:

- Constraints and dealing with them;
- Our desirable and achievable future, does work on constraints indicate any change in strategy?
- What are we going to do to make it happen?
- Next steps, follow up.

There is a short informational briefing on the strategy of the indirect approach. This concept suggests that the most effective strategies are those that are indirect. By indirect we mean that they encircle, get around, or undercut key constraints that exist, as opposed to directly confronting barriers that may be difficult to overcome.

The intent here is to put constraints in a positive frame of reference, as items to work around. Because constraints are considered positive, task force groups often find that their work here provides major leads if not strategies for their chosen strategic goal. It is rare for a Search Conference to adjust their desirable future after putting constraints under the creative gaze. Wherever possible, there is an interim plenary to ensure coordination of task force's plans in the interest of the total community.

The most successful strategies and action plans are those which are nested in time. If the ultimate time frame used for creating the most desirable system is 2005 for example, action plans may include subgoals for 1998 and 2000. Similarly, the plan will also include mechanisms for monitoring and coordinating progress, specifying who is responsible and when.

Final task force reports lead into a large group session where the community plans its continued life. This is the follow up session and it is here that the community decides what to do with its immediate product, usually some sort of report, setting out who should do it by when. Usually the community selects some of their members to do this; report writing is not the job of consultants. The community will also decide when to meet again and in what structural configuration.

## **The Process of Implementation**

The Search Conference is the middle part of an overall three-part process of pre-planning, search conference, and implementation. No two processes of implementation are the same, but how the community structures itself for implementation can make or break it. It is important that this new community of planners not fall back into a bureaucratic work structure. It should be careful not to organise itself into a traditional bureaucratic committee structure. A committee is typically run by a chair person, with membership and rules decided beforehand by those higher up in the organisation. Responsibility for carrying out the plan rests

with the entire group. not just higher ups, or sub-committees. A committee is only a mini-bureaucracy with the usual territorial bickering, leading to a rapid decline in attendance at meetings, enthusiasm and energy, and a waste of the gains made in the conference. Some Search Conferences overcome this by making sure there is commitment to maintain the self managing structure experienced in the Search Conference. Some conferences add time at the end for a Participative Design Workshop to organise the group into a democratic, self managing work organisation.

## **Principles at Work in Every Search Conference**

*Good cooks don't follow recipes, they use principles. Julia Child*

The Search Conference is simple, straightforward, and conceptually deep. It is based on concepts that cross over many disciplines, including ecology, psychology, and all the social sciences. It has benefited from over 30 years of research on the principles and theories needed for direct democratic learning and planning to occur. These principles are the heart of the search conference. Understanding them and how they operate in the Search Conference is critical to successful use. These principles also help differentiate the Search Conference from other participative approaches.

## **Democratic Learning for Living Democratically**

*Democracy cannot be imposed upon a person; it has to be learned by a process of voluntary and responsible participation. Kurt Lewin*

We use the word democratic when describing Search Conferences. In this context, we are not just talking about democratic philosophy or values. And we are not suggesting that organisations make decisions by voting or use representative means to run their business. Being democratic means that people who do the work, to the extent possible, have responsibility for the control and coordination of that work, whether it be making a product or developing a plan. For people to behave democratically they need a learning and working structure that is designed to get it. The two basic components of democratic learning are the democratic design principle and ecological learning.

The Democratic Design Principle. As a result of his action research projects with Eric Trist in the coal mines of Great Britain after World War II, Fred Emery perceived two basic principles for designing any organisation. The first principle he called bureaucratic, meaning that responsibility for control and coordination of work is located one level above where the work occurs. This is an organisation that by its structure de-skills and devalues people. The second principle he called democratic. An organisation designed according to the democratic design principle locates responsibility for control and coordination with the people doing the work, to the extent possible.

These design principles are always a matter of choice. In work organisations (like the British coal mines), the democratic design principle leads to the structure of self managing groups. People in self managing groups have enough elbow room for decision making ability to set their

own goals and get feedback, experience work that has plenty of variety and visibility of a whole product. The democratic work environment is a place where people have control over their own work conditions and have a desirable future worth living and working for.

The Search Conference is a temporary work organisation, and as such is designed along the lines of the democratic design principle, and is self managing. In the context of the search, this means participants are responsible for learning about the system and environment, doing the planning work, and carrying out their own plan.

Bureaucratic conferences are talking head designs where responsibility for content and outcomes rests with the organisers, speakers, facilitators, or chairs, not with the audience. Little learning results in a bureaucratic structure. Unlike bureaucratic organisations, the Search Conference has a democratic structure with no hierarchical dominance of one person over another, no master-servant relationships. This does not mean that anything goes in a Search Conference. It is not a laissez-faire event where it's every person for himself. Doing whatever you want is not democratic. Laissez-faire type conferences risk producing cynicism and frustration by not providing a clear purpose and structure for creative work.

The democratic design principle produces a fully working learning conference that takes responsibility for its own outcomes and implementation. In practical terms, this means that the people who participate in the Search Conference should be members of the system, not outsiders, because they will implement the new plan themselves. It also means that participants do the work in the conference, including follow up, while conference managers are responsible for their own work of providing the best learning environment possible.

Ecological Learning. The Search Conference is based on research that shows that humans have evolved to extract information directly from their social environment. The environment has an informational structure. It's loaded with invariances and patterns, in other words, real meaning. Since the environment contains limitless information, any person with an intact perceptual system can make sense from it. This innate ability to directly perceive meaning from the environment is sometimes called common sense. Access to information is restricted only by habit, lack of confidence, and physical or psychological isolation from the informational field. Bureaucratic learning structures, like traditional conferences, have prevented people from exercising their abilities to the point that direct learning is like a muscle that has atrophied. The Search Conference is an environment in which people flex their learning and planning muscles.

Humanity, by nature, is an intimate and indivisible part of its world. We were never tabula rasa, bottles to be filled up, tablets to be written on. People, as perceiving systems, are purposeful and have the potential to act upon and define their environment. The combination of this capacity in the environment to offer opportunity for direct understanding combined with the purposeful potential of every human, expresses the process of living in a meaningful world.

Our formal educational systems are based on the theory that abstract knowledge is superior to the knowledge we derive from first hand experience. The traditional approach demands that we be sent to school to get the right answers that are found in the warehouses of abstract knowledge accumulated from the past. Searching is a process in which people use their natural abilities to make sense of their surroundings. It is learning by doing. Exercising this ability has the effect of engendering self-confidence. As this confidence grows, people grow and become even more perceptive, and able to think. The environment itself changes as a result.

## **Planning for Turbulent Times**

*Instead of constantly adapting to change, why not change to be adaptive? Malcolm Emery*

Today's global environment is turbulent. changing faster than our institutions. It was not always that way. Up until the advent of the industrial revolution in the late 18111 century. the social environment of most societies was relatively stable and predictable. Most of our human past was spent in this type environment. Hunting and gathering, small village life, and agriculture were the norms. In this environment, organisations and cultures were designed for non dominant relationships. This applied also to the relation between people and their physical world, a genuinely sustainable way of living that fulfilled basic human needs. Values were stable and predictable. Now we call it the good old days. Search Conferences were not necessary then because continuous community talk was a way of life.

The industrial revolution changed the texture of our environment. The environment basically remained stable and predictable, but competition between systems over natural resources fuelled technical innovations, large scale hierarchical organisations, and less cooperation. Simple linear projection, expert driven, mechanistic problem solving and win-lose approaches were the dominant planning methods. It was during this period from about 1790 to post W.W.II that bureaucratic organisations were in full bloom, treating workers as replaceable parts, cogs in the machine of industry.

The term turbulent describes the texture of today's environment, an environment that has been emerging for over thirty years. Turbulence refers to the way the current social environment is producing change by its own dynamism and consequently creating uncertainty for any system within it. The environment is no longer predictable or stable. When people see the list of inter-connected changes in the world go up on chart paper at the beginning of the Search Conference, they appreciate the way all these changes affect one another and produce uncertainty for their own organisation or community.

In a Search Conference people experience a learning environment in which they systematically explore their entire environment. The purpose is to find ways to actively plan so that they are both responding to and changing their environment as they go. It's called active adaptation and it is what searching is all about. Adapting does not just mean getting faster or being more flexible. It means becoming actively adaptive-developing a system's capacity to be a community that continuously learns from and changes its environment. A system can reduce turbulence by changing the conditions that surround it and by influencing its future direction. The way to do this in a turbulent environment, is through the sharing of human ideals. To become adaptive, a system needs to make sure there is alignment between its own desirable future and the desirable future it has for the world.

The learning environment of the Search Conference allows people to seek human ideals together and use these to develop a future worth living for. It's not just about value clarification where people get clear on what they think is important and what guides their behaviour. It's more than that. It's all about creating the highest human capacity through community.

Search Conference planning differs from the type of short term planning required for your next weekend cookout. For the cookout you need only to consider a handful of variables within a short time period-whom to invite and what to cook? You would not expect major changes in the food preferences of your friends within a week, although today such shifts cannot be ruled out. Search Conference planning is concerned with long time frames. In a turbulent, uncertain global environment, the simple cookout approach to planning will not work. There are too many variables outside the control of the system. Building plans for our future that are based on our shared human ideals is the way to plan effectively in uncertain times. Being clear about the ends we want to arrive at five to ten years from now allows us to be adaptive in choosing the means to get us there.

The Search Conference is about strategy. It is all about making our desirable future happen, not just being visionary. Dreams do not come true without hard work. The Search Conference adopts the strategy of the indirect approach as developed in the Art of War by Sun Tzu and exemplified in the ancient Chinese game GO, as it is called in the West. It means the art and science of manoeuvring. The strategy of the indirect approach, in contrast to the direct approach that looks to win battles in the short term, takes a much longer time horizon. Its goal is to maximise territory while minimising the use of resources. The message is: Do not waste costly resources fighting battles, prevent war. Manoeuvring through implementation, another puzzle approach, is the approach for a world of uncertainty. In the Search Conference, people check the reality of their new strategies by identifying ways around key constraints. The indirect approach results in an array of practical strategies and actions that are most likely to stand the test of time and uncertainty.

### **Effective Communication for Building Community**

*There is a real world, and it is knowable to the ordinary person. Fred Emery*

The Search Conference is designed to produce effective communications. Successful communication depends on four basic properties that were discovered and researched by Solomon Asch. These properties are called the conditions for effective communication. They come to life in the conference. The basic idea here is that face to face learning happens when people enter into a relationship in which they want to influence each other regarding some real task they care about. If the following conditions are met, group learning and planning can occur.

**Openness.** In order for people to communicate effectively, they have to know they are in a situation that is totally open to their investigation and that things are what they appear to be. The Search Conference is a learning environment where exploration and checking out are valued and where it is assumed that differences in perception and opinion exist. It is healthy and creative to acknowledge such differences. Mutual learning follows from the sharing of different experiences and perceptions.

A climate of openness in a Search Conference begins with the briefing of participants before the conference and a straightforward statement and display of the conference agenda, purpose, and expectations. Perhaps the most striking innovation towards openness, which is now taken for granted, is the use of chart paper to compile an immediate, accessible and continuing record of work as it occurs. These publicly displayed papers provide the ultimate guarantee of openness and absence of manipulation.

We are all humans with the same human concerns. Most people naturally seek confirmation of their basic human similarities. Once people see that the behaviours and motives of others are similar to their own, it becomes possible for them to admit they can learn from each other. Any perception that a participant or conference manager is acting as expert or talking down will reduce the effectiveness of mutual learning.

Early on in the Search Conference, people discover their similarities through sharing of ideals about their desirable future of the world. Publicly shared ideals makes them visible and real. It confirms that there is an underlying level of concern with humanity and the state of the world. Human ideals transcend gender, race, status, or age. By discussing and deciding our desirable future in either global terms, we establish a climate of working together.

We all live in the same world. The first task of the Search Conference is for people to state out loud data they know concerning changes in the world over the last 5-7 years. The rule is that all perceptions are valid. This data is publicly listed on chart paper. Accessible to all and manipulated by none, this snapshot of the changing world establishes the validity of the notion that we all live in the same world. This process establishes that the environment has real features, commonly perceived, and forms a shared context for planning and action.

**Trust.** When people experience an open learning environment, appreciate that we are all humans with the same human concerns, and we all live in the same real world, then trust develops. As trust accumulates in the Search Conference, so do interpersonal relations strengthen and deepen, increasing the probability of

mutual learning and network building.

The process of implementation would not be possible without this spiral of trust, learning, energy, and commitment. The presence of trust is tested towards the end of the Search Conference when participants self select into task forces to work on action plans. Each self selected subgroup is working on behalf of the whole community and must be trusted to do so.

The real key to direct action is open communication and discussion among people. The Search Conference restores the human process of speaking and hearing, the oral culture known to older (or ancient) peoples. The world of literacy and bureaucracy is silent.

## **Finding Our Common Ground**

*Democracy is harmony through conflict. Wynton Marsalis*

The Search Conference takes us beyond unanimity and consensus decision making to an environment in which people make their differences clear and base their future strategies on the common ground upon which they can agree. Conflict is an important feature of the Search Conference. It is not avoided. In the Search Conference people take conflict seriously. They work to truly understand and clarify their real differences. This is important because while these differences may not be part of the strategy the group adopts, they continue to exist within the community during implementation. Experience shows that when conflicts become clear and respected by the group, they diminish over time.

At various points in the Search Conference, the community must make important decisions. The crucial decision points are agreement on the desirable and probable future of the world, agreement on the most desirable system, and action plans. Finding common ground works as follows. After small group work on the desirable future of the world, for instance, is reported and integrated with other group reports, two questions are raised. First, questions of clarification of the report and then a question as to whether anyone cannot live with or is not prepared to work towards any item on any of the reports.

If there is such a response, it is first debated fully in large group. If there is substantial disagreement, a couple of people from different sides may be sent out to negotiate the point, while the rest get on with the task of integration and agreement. If negotiation fails, the item goes on a disagreed list. It ceases to be part of the further work of the community.

In this process we are not assuming there will or should be consensus within the community. To do so is unrealistic, particularly on topics where there are legitimate and institutionalised adversarial positions. The aim is to precisely establish common ground and to know exactly where the thin line between agreement and disagreement is located. groups with a history of conflict tend to assume a greater area of conflict and less common ground than actually exists. Once the common ground and its boundaries are clarified, the community can continue work towards its goals on the basis of the common ground regardless of size.

Using the disagreed list as a way of clarifying and respecting a conflict is important at the beginning of a search conference. It shows people that a simple, controlled mechanism is available for dealing with disagreements. People realise they can use this process later in the conference for more intense conflicts that are closer to home.

In today's trendy world there is concern about verbal aggression. It should not be surprising that when people are planning around their most deeply held concerns, they may become excited, indeed angry over differences. If they were not, there should be concern that either the wrong people were in the room or that dissociation had reached a point that all such participative planning was useless.

## **Planning a Search Conference**

*90% of life is showing up! Woody Allen*

### **Search Conference Managers**

Ideally. Search Conference managers are involved from the start. Search Conference design and management require knowledge of search principles, ability to creatively match these principles to the search task, and the skill to design on the run once the conference is underway. Search Conference managers normally are experienced consultants trained in the Search Conference method. Managers come from outside the system and are responsible for conference design and management. It is preferable that conference managers are not experts and do not have a vested interest in the subject matter. However, they do need to immerse themselves in the circumstances of the system so they understand what people are talking about. The job of conference managers is strictly limited to providing a democratic structure for

the group, and not becoming involved in the content.

## **Preparation and Planning**

In most cases, several people from the system act as a planning group to organise the conference. Their job, working with conference managers, is to clearly identify the system that is the subject of the Search Conference. This is a critical step because it determines the task of the conference and guides the selection of participants. Once the system is clear, the planning group goes on to identify the conference task and manage the selection process.

Often the identification of the system is straightforward. For example, at Hewlett-Packard, the boundary of the system was the entire manufacturing plant that needed a new strategic plan. In the Macatawa search, the system was a geographic region of the state of Michigan, including several townships and communities.

Sometimes the system boundary is more complicated and difficult to determine. In the Nebraska mental health search, there was a desire to define the system to include a strong consumer orientation. Identifying the system as consumer based mental health led to the inclusion of consumers as participants. In the Colorado Front Range Water Search Conference the system was limited to water engineering among eastern Colorado communities. The system definition led to a decision to involve water experts only and keep the conference focused on future water resource usage in the region. In another Hewlett-Packard search, the system was identified as workplace empowerment in a specific manufacturing plant. Plant-wide strategic planning was not part of the process.

Once the system is identified, the conference task follows a simple formula: A plan for the most desirable future of X that participants will carry out together. Applying this formula to one of the examples, the purpose of the Macatawa Search Conference was to develop a plan for the most desirable future of the Macatawa Region that participants will carry out together.

The most important element in planning a Search Conference is the selection of participants. They are chosen because they have important knowledge about the system and can implement the plan that comes out of the conference. Because the Search Conference is about puzzle solving participants are selected because they carry pieces of the puzzle in their heads. If a major piece is missing the puzzle solution may be inadequate or the implementation difficult. People from a system know who in the community has the knowledge (puzzle pieces) necessary to put together the whole puzzle.

There is a difference in how to choose participants for a community search and an organisation search. For community searches, it is best to use the community reference system as the basis of selection. The great advantage others approach for geographical community, industry, and issue searches is that the community broadly defined determines the participants.

The community reference system works in the following way:

1. Draw a rough social map of the system, whether it be community, issue, or industry, covering such aspects as interest groups and demographics;
2. Decide the criteria against which people are to be selected, such as areas of expertise and knowledge of the system, and potential for implementation;
3. Pick a starting point person in each sector of the map and ask them for two or three names that fit the criteria. This is for help only, no guarantees of invitation are given;
4. Ask each of the new names to give two or three names that fit the criteria;
5. After one or two go arounds, some of the same names should appear. Select these from the total list and add others to make sure the map is covered;
6. It is not considered relevant that they be educated, literate or articulate.

This community reference system clarifies that Search Conference participants are not there as representatives as they would be on a representative committee. They do not see themselves as stakeholders who are there to argue for and get the best deal for their constituents. Participants are briefed that they attend and participate just as themselves. In this, they are there as representatives of the human race and its basic ideals.

For organisation searches such as corporations, the membership consists of those who hold responsibility for the health and direction of the organisation. It is not appropriate for outsiders to attend, as they come from the environment not the system. Participation is determined by the boundary of the system; people with puzzle knowledge inside the boundary of the system.

The system itself in preparing for a Search Conference, may realise they require more research data about a particular area before the conference. For example, a community may want to provide some demographic information to participants before the conference. Or an organisation could survey their customers concerning their needs and expectations. The timing of a Search Conference should not be decided until sufficient preparation has been done to ensure confidence in the outcome.

All participants should be fully briefed about all aspects of the Search Conference beforehand. This works best in face to face conversation that can lead to design improvements as well as greater understanding of and commitment to the task. When participants show up for the Search Conference, they should know what to expect and be ready to participate immediately. Once the conference is underway, the work of the planning group is complete.

### **Time, Place, and Numbers**

Normally a Search Conference takes two nights and two days. Longer periods risk cognitive and emotional overload. Shorter conferences run the risk of not establishing the environment and system learning required to create a planning community prepared to implement its plan.

A Search Conference is not an everyday went and does not fit normal business hours. The best starting time is late afternoon. It is essential to create a relaxed social atmosphere in which people can become acquainted. Introductions, briefings, and expectations can occur before dinner, preferably served buffet style. Work proper starts after dinner and continues to about 10:00 p.m. It continues through the next day and evening finishing late afternoon on the third day. Flexible arrangements help. Continuous access to refreshments is better than fixed times, because breaks are hard to predict.

People cannot be expected to work intensively and creatively in their normal office environments. They need to be free of distractions like phones and messages. The Search Conference is a social island. Facilities should be open to outside and fresh air, have plenty of wall space and be reasonably comfortable. However, Search Conferences have been held in sub optimal conditions and worked. The facility is far less important than design and management.

Search Conferences work best with 20-40 people. Less than 15-20 takes on the character and dynamics of a small group. There is not enough diversity of data and perspectives to produce the energy and creative thinking that characterise a large working group. The upper limit has been successfully pushed up to 50 or more, but requires more time and management skill to pull off. Other participative approaches are able to accommodate more people because they limit the notion of participation to input, or do not establish a community that carries out its own plan.

For larger numbers, a multi-search is required. A multi-search consists of two or more Search Conference running in parallel. Multi-searches are risky because of the difficulty of design and coordination. On the other hand, Larger numbers may gain a large multiplier effect in terms of diffusion. The multi-search can be avoided by more careful selection of participants. It should be possible to select participants who wear many hats. It may be preferable to design a series of Search Conference that can be integrated later in various ways. There are many variations on the theme; all are questions of design.

### **After the Search**

The Search Conference is now a well established and highly reliable method of participative planning. It has the power to produce learning planning communities committed to making their own future happen. Not only do people walk away committed to their plan, they also have learned how to search so they can continue to adaptively change.

While the Search Conference produces adaptive relations between system and environment, it requires nurturing in the long run. The key to continued success is what happens after the search, and why. The most frequent answer for why is that the search group developed a democratic structure for implementation. Successful search groups stay away from the bureaucratic committee structure. They implement by making sure the group maintains responsibility for the control and coordination of the plan. People move to a new level of shared responsibility for their own affairs. The Search Conference provides an experience of and learning about direct participative democracy.

Communities and organisations that have searched and implemented their plan through a democratic structure become systems that continue to adapt and learn. The democratic design principle and ecological learning become as natural as walking and talking. Members of such an organisation or community develop a keen awareness of their turbulent social environment in the same way a farmer keeps an eye on the changing weather conditions. Many groups set aside a day or so at regular intervals for formal long term

planning. As time passes, searching becomes much less formal; it becomes a way of life. People naturally respect others' perceptions. Management is everybody's business.

Rules give way to purposeful conversation . The product of planning through a Search Conference, therefore, is not just the plan but the continuing learning planning community.

Robert Rehm and Nancy Cebula are leaders in the application of the Search Conference and Participative Design methods. They have done this work with communities, corporations, government, educational institutions, and regional groups struggling with contentious issues such as environmental or social problems. They train and coach practitioners in the theory and use of these methods. The common thread of their work is moving systems towards democratic structures and values to improve system effectiveness.

Merrelyn Emery has a long history of involvement in democratisation to produce organisations for continuous learning. Her continuing professional interest is in the development of the Participative Design Workshop for organisational design and the Search Conference as a reliable method of participative strategic planning. Her recent efforts have focused on training programs for Participative Design and Search Conference practitioners. She can be contacted at the Australian National University, Canberra, Australia.

The article Participative Design by Robert Rehm is also available. It describes the Participative Design method developed by Fred and Merrelyn Emery that enables people to redesign their workplace to be self managing.

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