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BUILDING COMMUNITY AND COMMITMENT TO THE FUTURE: THE SEARCH CONFERENCE ©

The search conference is growing in popularity as a method for developing community plans and to galvanize action to achieve those plans. First conducted in England in 1959 by its developers, Eric Trist and Fred Emery (Weisbord, 1992), search conferences have been used in the U.S. and in many foreign countries in private industry, government, and communities to produce participative strategic or "big picture" plans. It is grounded in the work of Bion (1961). The search conferences fits into a broad category of events described by Bunker and Alban (1992) as large group interventions and is very appropriate for use in community settings. These interventions are generally characterized by their focus on broad participation in an egalitarian setting for such activities as strategic planning, work place re-design, organization change, and problem solving. A somewhat different form, called the Future Search, was developed by Marvin R. Weisbord (1995).

The search conference has a specific structure based on principles of participative democracy and theory concerning how groups form and work together to accomplish tasks. Four features characterize the search conference:

1. The search for "common ground" regarding the desired future.
2. Focus on the desired future, rather than on solving problems.
3. Group-managed activities including self-management or self-facilitation of small group tasks.
4. Emphasis on action-taking in addition to planning. The intent is for the participants to take responsibility for implementation, even if they personally cannot take all the necessary actions.

Common ground differs from consensus-building. It assumes that there is a



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shared desired future or some outcomes, however small, that a diverse group of people can discover and agree to achieving. Areas of disagreement are handled by posting such items on a "disagree" list. Various vision elements and goals can be included, so long as they don't conflict with each other. Because the focus is on areas of agreement, without the compromises that often result from a consensus process, all are working together on elements of which there is virtual unanimity. A common result is the building of a cohesive community.

Focus on a desired future or vision leads to a different dynamic and different actions than does problem-solving. When groups focus on what they want, they tend to become energized and motivated to act. When they focus on problems, especially serious problems, people often feel discouraged and anxious, and, after an initial surge of energy, end up taking less action. Also the actions required for creating a desired result are often different from those required to get rid of a problem.

Activities such as break-out group discussions are self-managed, meaning that groups discuss the assigned task within the time frame, record the discussion accurately and report it to the larger community — without benefit of a group process facilitator. To help the group work together, break-out groups are asked to select a recorder, reporter, time-keeper and/or a facilitator and to rotate those roles, to begin with introductions and then to work on the task. This feature is based on the principal that people are capable of managing themselves and do not need to be guided or managed by others who are not involved in the content discussion. Although group discussions may not always proceed smoothly and may include conflict, the underlying assumption is that they are capable of working it out, without the aid of a facilitator, because of the clear focus on a compelling task. This is a key principal behind the search conference, a process designed to lead to participative democracy. This has a practical purpose, too, especially for communities: in the future, they will not have the luxury of calling in a facilitator every time they want to have a meeting, so this is an opportunity to develop the skill needed and experience the power of the working mode of small groups. If a group has trouble, conference managers coach individuals who approach them for help, suggesting things they can say or do to re-focus the group.

The entire structure of the search supports the building a sense of responsibility for outcomes and commitment. Having a large portion of the search devoted to action planning assures that the group will have sufficient time to focus on this and to decide what they can do as a group and as individuals to effect the choices they make.

The Process

The following description of the search conference will use as an example a multi-search conducted in the Crestone-Baca-Moffat (CBM) community in south central Colorado. The search conference process includes nearly as much time devoted to pre-conference planning as to the search itself. The sponsoring entity much first determine whether the search conference is the correct process. Criteria include the following:

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- a. Is the desire of the sponsoring group to develop a stronger sense of community?
- b. Is the desire present that the group or sub-groups take responsibility for follow-up, at least on some actions?
- c. Will it be beneficial to have a process that will quickly bring a group to a sense of cohesion and common ground around some key areas.
- d. Is it possible to convene participants for a 2 1/3 to 3 day period?

Preparing for the Search

If the sponsoring group determines that the search conference is the correct process, they then organize a pre-conference planning group; it should include people from various sectors of the community for whom the search is being conducted, not as representatives, but as those who know about the different sectors. The planning group will make carefully-considered decisions about the structure of the search conference, including such things as the focus question itself. Usually, this will be narrower, but in our example below, it was simply, the "Future of the Crestone, Baca, Moffat area."

The planning group will also decide whom to invite. There are two schools of thought on this. In the search conference literature one says that invitees should be the people who have knowledge about the search topic and are willing to be responsible for decision making and implementation. The second comes from our practice. When the search conference is for a community, it needs to be inclusive, accommodating all who wish to come, a principle used in the example here as well as including key people with power to influence and implement. Opportunities must be provided to involve all who wish to participate in the larger community planning effort but cannot take part in the formal search conference. These opportunities could include such processes as a town hall meeting prior to the Search, a survey, or small group discussions with input to the Search group.

An effective approach to identifying the key invitees is a "community reference system" - asking people in the community or in each sector who should be there. When some individuals are named repeatedly, this indicates that they are appropriate participants. Usually, 35 to 40 is considered to be the right number for a search conference. This may conflict with a goal of inclusivity in community development, so communities may need to have other processes for including all who are interested, such as town hall meetings, open forums, etc. If the number is not too large, the community may decide to do a multi-search, in which several searches are conducted simultaneously, with the results then integrated. In our example, the search-conference planning group wanted to include all who wished to attend and actively sought broad attendance, while at the same time attempting to assure that attendees from all the various groups — ranchers/farmers, retail and service business owners, old and young citizens, non-resident property owners, environmental advocates, members of the various spiritual communities, and people from all three specific localities participated.

Other questions considered by the pre-conference planning group include logistical questions such as the time allocated, where to hold the event, what arrangements will be made for meals, what funds are needed and how to obtain them and how to enroll people in attending. The Search is a 2 1/2 day event, which is one

There are two schools of thought on "who to invite" in the search conference literature: one says that invitees should be the people who have knowledge about the search topic; the other says that invitees should be stakeholders, those who are responsible for decision making and implementation.



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of its distinguishing features. Although this length of time can be a barrier, especially in community use of search conferences, it is based on research (by Trist and Emery) showing that working together for this length of time is a major factor in building cohesion among the participants. Our experience with a number of community searches is that people do attend and stay for the entire time because of the importance of their community's future to them.

Those who lead the process, who are trained in search conference methodology, have the major role in developing the sequence of events in the search itself. Although these are fairly prescribed, they are tailored to accommodate the specific needs of the community and, as the search progresses, to accommodate the needs of the group or unforeseen events. They are called conference managers rather than facilitators, simply to make clear that they do not guide the conversations (except in extreme situations if groups become bogged down), but only the form and activities. The conference managers are generally outsiders because trained people in the community often need and want to be in the search as active participants. The initiator in the CBM search was a trained conference manager but knew she wanted to be a participant, so asked us to manage the search.

In the CBM search, as they first began to advertise the Search, the planners doubted the likelihood of attracting the forty people set as the necessary minimum number for success in this case. Then, near the deadline for registration, 145 people had registered. The conference managers scurried to find three more trained search conference managers to assist.

The Search

The search begins with a global focus and then gradually narrows to the decisions at hand. It generally includes the following steps:

- a. Brainstorming about global trends, forces, events; then working on agreement about probable and desired futures for the world. Brainstorming is done with the whole group; the conference managers record on butcher paper, writing as fast as they can to capture every item. Discussions on the probable and desired future are in small groups, with the results then integrated.
- b. Brainstorming about the "task environment" - those trends, forces, events directly impacting the community or search conference topic. This is a similar process as that above, but the focus is narrower. Through both these processes, participants start to see how their values are shared (or not) by others in the room, and how their community is affected by its context. People discover they are psychologically similar to other human beings and develop a "shared psychological field," both conditions for dialogue. Thus, a sense of community starts to build among the whole group.
- c. History or, as in the CBM search, storytelling about personal history in the community. The affect of this was to bond people through awareness of their common appreciation of what they liked about their community. Sometimes this is illustrated; sometimes it is in words. It can be done in small groups or in the large group; we did the former in this case. Because of the nature of this community, a common thread that binds people is the feeling they were "called" to move there. We asked people to share the story of the "calling"



and record highlights or themes of these stories. Each small group then reported its themes.

- d. Identifying those elements existing in the community that attendees want to keep, drop and create. Again, this is a large-group process in which all simply indicate their wishes. Again, the search conference managers are recording the items on three different sheets that have been set up on the wall or on easels. This is application of the values to the community itself.
- e. Work on desirable future of the search topic in break-out groups. Groups are asked to agree to five to seven desired end states that describe what they want in the future. Items are limited to a manageable number to prevent the search community from being overwhelmed.
- f. Integration of the major themes from each group. Each group is given a few minutes to report out its five to seven themes; clarification questions are asked before agreement is reached by the community that the statement represents a desired future for all in the search. If agreement is not reached, the item goes on the "disagree" list. Then the themes are narrowed down using criteria the group develops. Finally, the themes are integrated, either by a small group of persons from each group working together or by putting the lists side-by-side and then consolidating the like themes as a whole. Or, one group may indicate an item, then other groups with similar themes can combine theirs; the next group states another theme, and so on.
- g. Conduct action planning to develop first steps; often this is done by theme or element, with people "voting with their feet," moving to an action group working on the topic of their greatest interest. The groups then restate the theme on which they are working, develop a vision statement and then identify constraints and strategies to overcome the constraints, then brainstorm and discuss actions to lead to the goal.
- h. Develop next steps. All small action groups again report to the whole search community. Then, the entire group discusses the next steps, including how to coordinate the activities of the various action groups, follow-up meetings, and how to disseminate the information to those who did not attend.

Results of the CBM Community Search Conference

The CBM search conference was considered by participants to be very successful. Participants were excited and eager to move forward on the seven themes on which they chose to work; action groups had been formed and dates set for their meetings. The themes are show in the margin at left.

They also had agreed to have one person from each of the action groups meet to serve as a coordinating mechanism and to convene again as a total group in three months. The local newspaper had agreed to publish reports from the groups and a report would be compiled and filed in the library and at the local coffee house. Also, efforts would be made to broaden participation in the action groups.

When the group met three months later for its follow-up meetings, significant action had been taken, including obtaining funds to hire a consultant to address

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• *Business and economy that accommodates various lifestyles.*

• *Keeping the community small in fact and feeling.*

• *Building infrastructure, both utilitarian and social.*

• *Preserving and protecting the wilderness and environment.*

• *Living sustainably, both in housing and gardening/farming.*

• *Self-governance, involving more people in community decisions.*

the action plans related to zoning, infrastructure and land use; exploring new approaches to managing land use, water quality, pollution; setting up a farmers' market and a seed bank and developing a brochure concerning sustainable life style; creating a resource map as a baseline of the area and forming a joint planning group for re-siting a post office. Some of the groups reported dwindling interest, while others reported increasing interest and activity. People who had not been at the search were "oriented" by having each action group review its vision statement and goals.

The follow-up meeting is an opportunity to assess progress, to renew interest, and to realign and recommit to goals. At this stage, groups can see where they need to shift their actions to accomplish their goals, where they may need to expand participation, and what other resources they might need to obtain. The follow-up meeting continues the spirit of the Search Conference by again, having groups be self-managed. They often choose, as the CBM group did, to have the meeting also be a celebration and a chance to reconnect, in this case with a pot-luck dinner prior to the business part of the meeting. Some of the original conference managers were in attendance, not running the process but only there as a resource.

Potential Benefits and Pitfalls

As indicated in the discussion of the search conference intent, the potential benefits include development of a cohesive community that is responsible for and committed to its own future, the core of the community development philosophy. The hope is that the group will take vigorous action to accomplish those things that they see as steps to achieving the community they desire. Its focus is on encouraging or creating a space for participative democracy to occur both in the planning and in the implementation. It attempts to avoid even a subtle implication that others are responsible for one's behavior that might arise when small groups are facilitated. It also attempts to avoid creation of a bureaucratic form in which committee chairs bear the primary burden of responsibility for the outcomes.

The pitfalls to avoid center primarily around the pre-planning and preparation process. It is essential to have people on the planning group who can attract the key stakeholders or information sources that need to be there. Only when the appropriate people are in the search can significant action occur afterward. Identifying these people can be a laborious process which the planners may want to skip risking a less-than satisfactory or failed search.

It is also essential that the search question or topic be carefully selected. In this example, the topic was first presented as a "vision process" which many people saw as repetitive of previous activities and/or an "airy-fairy" exercise. When it was presented as "the future of the area," even though still extremely broad, this interested and attracted people.

The third pitfall is in the realm of "marketing." Simply putting a notice in the newspaper or even posting flyers around town is not enough. As the CBM search group found, contacting people personally through telephone calls or visits was necessary in order to enlist attendance of people from the full spectrum of the community. Even then, a smaller proportion of some segments of the community than others attended. An even more diligent effort to recruit might have been useful.



One last pitfall has to do with the policy of inclusivity in community development. The entire community (if it is larger than 30 to 60 people) cannot participate in a search conference. Even with a multi-search, in which several searches go on simultaneously, followed by integration of the results of each, the logistical problems become a nightmare if more than about 200 people are participating. In such cases, it is possible to do sequential multi-searches, but even then, the process is costly and difficult to manage, especially when it comes to integration. Obviously, in community development, many processes are used that engage only a portion of the community (e.g., community leaders). But, it is critical to allow for participation for any- and everyone who has a desire to contribute to the community, if the community is to encourage participative democracy, to obtain buy-in around a shared future, and to use its resources to the fullest. An alternative to sequential multi-searches, in communities where many people wish to be included, could be to have open forums to obtain input, consolidate the input around themes and then use that as a basis for a subsequent search conference.

The search conference, in this as in other situations, seemed to be quite successful in producing a strategic plan and follow-on activities in some of the areas. Participants also reported that they experienced a sense of excitement, optimism, and commitment that they could create what they planned that carried them for some time into their future activities.

If the search conferences seems as though it might be a desirable and feasible approach to your community's strategic planning, what would be the first steps? It is probably wise to review some the books and articles on the search conference, particularly those with case studies, to get a better sense of the format and the results. You may wish to talk either in person, on the phone or by E-mail with people who have participated in a search conference. Then, if you decide to proceed, although you could attempt to conduct a search using published information and advice from practitioners, most communities have the best results if they have someone trained in this methodology to run the Search. Sometimes organizations send staff to the training so they can run their own searches. Hundreds of people, both internal staff and consultants, have been trained in the process, so it will probably not be difficult to find someone in or near your geographic location by contacting the training entities of either those who do the Search Conference or those who do Future Search, a similar methodology. Contact information is provided below. Oftentimes, newly-trained people are eager to apprentice with a more experienced search manager on a voluntary basis so as to get experience.

Two things to keep in mind when obtaining the services of outside consultants are: 1) that they have experience in the process, and 2) that they have experience specifically with communities, because community searches are very different from those in organizations. By talking with prospective search managers, as when you engage consultants for other work, you will be able to get a sense of whether or not the consultant is a good match with your community. The search conference, like any other useful process, is only as good as the pre-planning, process knowledge, and competence allow.

Its focus is on encouraging or creating a space for participative democracy to occur both in the planning and in the implementation.



Search Conferences Resources

International Institute for Resource Management, New Mexico State University, Box 30003, Dept. 3169, Las Cruces, NM 88003-0003; (505) 646-1044 (Emery model, used in the CBM search)

SearchNet, 4333 Kelly Drive, Philadelphia, PA 19129; (215) 951-0300 (Future Search model)

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