

## THE USE OF (FUTURE) SEARCH CONFERENCES AS A TOOL FOR TWO COMMUNITY DEVELOPMENT TYPE EXERCISES IN VICTORIA.

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### Abstract

*A (Future) Search Conference is a carefully planned, custom designed, participative event embedded in a longer process of planning and improvement. Its main focus is to create ideas for future action that is to be implemented by the participants. This paper outlines what a search conference is and, by using recent Australian examples associated with homelessness and community development, how it can be a useful tool for 'front end' evaluations.*

It is very strange that the use of the Search Conference (sometimes called Future Search Conferences), i.e. “*a social event convened to create a collaborative picture of probable and desirable futures and to develop plans to move towards that desirable future*” (Willians, 1984: 29) or for problem solving has not been particularly common in Australia in recent times. The reason for saying it is strange is that, although the search conference was developed in the mid 1970s, in this country, by Fred and Merrillyn Emery [and culminated in a book written by Merrillyn in 1996), the technique became much more popular and widely used ‘offshore’, particularly in Europe and the USA.

Basic assumptions behind the approach are that people are purposeful, and also want to learn about, and create, their own futures. Furthermore, with: the arrival of empowerment evaluation (Fetterman, 1996, 2001, 2003); an increased push for participatory and collaborative evaluation approaches; a desire for increased development of social capital; and cries for more community involvement, the approach has resurfaced and is worthy of a second look. So, in this paper I describe what a search conference is, what it entails and then look at two very different examples where this technique has been used recently within Victoria.

### What is a Search Conference?

A Search Conference is a participative, strategic planning method and, therefore, is a particularly suitable technique for both proactive (forward looking, ‘front-end’) and interactive (participatory) forms of evaluation (Owen, 2006).

Some particular features of such a conference include that it:

- involves a democratic process where there is planning for the people by the people
- acts as an agent of social change
- normally involves 20-30 people from an organization or community
- is held in a retreat-like atmosphere, usually away from the participants' normal environment
- lasts two to three days
- consists of a mixture of small group and plenary sessions
- starts and ends with a plenary session
- is organised by a facilitator
- generates material which is recorded on a flip chart for use in a later report
- expects people to learn from the process and to act on the outcomes
- results in collective action planning deciding who is to do whatne, when and with what resources. This may result in the setting up of sub-committees or steering committess for ensuing action.<sup>1</sup>

### **Examples of Search Conferences**

Applications for search conferences have been wide-ranging and have dealt with: regional issues; planning for health systems; corporate planning; product development; urban planning; school development and reform; industrial issues; public sector planning; environmental issues; and economic development. They have also been used for policy making.

Specific examples have occurred in the following domains:

**Health:** in order to build community food security (McCullum, 2002) find common ground and action in relation to repetitive strain injuries (Polanyi, 2001) and determine the future of dietetics education and credentialling in America (Parks, 1995)

**Education:** as a means by which to involve a local community in college planning (Casolara, 1999, Quereau, 1995), to effect educational change (Bailey, 1992) and to plan school library services across a state (Baldwin, (1995)

**Business:** as a participative way to plan a merger (Large, 1998), for strategic planning for a company (Cabana, 1995) and for the redesign of work (Axelrod, 1993)

**Community Development;** as a way to make communities work better (Large, 1998b)

**Environment:** as means to engage local communities in wildlife management planning in Canada (Schusler, 2002);

### **Who should Take Part in a Search Conference?**

It is suggested that those to be invited to a search conference should be those with a vested interest or (expert) knowledge in the area. But this means that rather than

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<sup>1</sup> While I have given a generic description, Crombie (1985) suggests there are several types

professionals, it should be consumers. So, normally at least a half attending should be those who are to be affected most by the decisions made e.g. residents, citizens, workers, major interest groups, the elderly etc. The remainder should be those who can contribute expert opinion such as professionals with related interests, policy makers or government representatives. However, it is usual for the latter to be mixed in with other members of the conference. As Crombie points out while such a combination may:

*...almost inevitably yield a group in which there are differentials of status and ability, it is a fundamental presupposition of the search conference process that every participant has a contribution to make to the task and each participant has equal potential to put forward ideas, questions, facts or visions which might help shape or restructure the task as a whole. (Crombie, 1984: 10)*

### **Resources to Take Into the Conference**

It may also be useful to take certain resources into a conference so that attendees can consult these if necessary. For instance, if the Search Conference was to be about future transport needs then it could be useful to take in census data, maps, timetables, by-laws related to travel etc. for reference and to aid decision-making.

### **Tasks to Complete**

Within the conference there are several major tasks to accomplish but basically it starts with a wide perspective to explore possibilities and then narrows to produce key strategic visions. In whatever time is allocated, each conference is expected to spend:

- a) the first third learning about current trends in the environment and any recent changes (this is dealt with first as it is felt the participants would find this the easiest section). Questions at this stage could be: Where are we now? What are our existing goals, resources and constraints?
- b) the second third dealing with past history. Typical questions posed at this stage are; What has shaped the present? What has made us what we are? What do we need to preserve?
- c) Then the final third should create visions for the future. Questions at this point might be: Where do we want to get to? What do we want to become? These are then tested against existing constraints before the group figures out how to implement strategic goals. (Fig 1)

Through scanning the broad environment holistically in such a way (including historical, political, economic, technological and moral factors) those involved learn about the environment they are in and, when informed, can make judgements and generate recommendations for the future.

Other processes involved are that:

- a conference involves a great deal of pre-planning
- there are no presenters or speakers
- people are self-managing re tasks
- most perceptions are spoken and recorded (often by note takers on a flip chart)

During the course of a conference there are several principles at work. First there has to be encouragement of open dialogue and open thinking in conjunction with recognition that all perspectives should be heard. Not surprisingly then there has to be rationalisation of potential/actual conflict in order to find common ground.

What is different from many other planning group activities though, is that the group has to take responsibility for action at the end of the conference and after the conference is over. So attendees are expected to create a plan and attempt to implement the plan afterwards. At this stage (the aftermath) the process broadens out again (Fig1)

### **Fig 1 Search Conference Process (after Emery)**

QuickTime™ and a  
TIFF (LZW) decompressor  
are needed to see this picture.

### **The Role of the Search Conference Facilitator.**

The search conference facilitator has a number of tasks to perform during the whole process. In fact the facilitator should be involved from the outset. Therefore, s/he needs to:

- Consult with the conference planning group
- Help to design the conference structure
- Run tasks within the conference
- Manage and ensure an optimal learning environment
- Manage large group dynamics
- Have strong time management skills.

However, quite often the facilitator takes in an assistant who helps to record/takes notes or assists with any small group activities.

Importantly, though, a facilitator needs to manage all aspects (physical, emotional, timing etc.) of the search conference environment while not intruding on the content, which has to be the responsibility of the participants. Another key aspect in this managerial role is that of being an external ‘outsider’ –of being detached from vested interests and in some way unaware of past history. This also makes it easier to hand over responsibility for future action to attendees.

### **Applications In Australia**

In Australia, very few search conferences have been described in the literature. An exception was one took place over 20 years ago---and this was designed to empower older adults by involving them to create a state policy on ageing in New South Wales (Williams, 1984). Otherwise we only hear mention that in the early ‘80s:

*The search conference was used by the ‘Telecom 2000’ planning team; by the ‘Jackson Committee’ on the future of Australia’s manufacturing industry and by ‘Australian Frontier’ in their two national conferences on ‘Future Directions’ for Australian society. (Crombie, 1985: 3)*

So what I intend to do next is to look at two search conferences that have taken place much more recently in Victoria. One sought to empower, homeless men while the other wanted citizens to plan for a community’s future.

### **Improving the Health and Situation of Homeless Men in Northern Areas of Melbourne**

The first Search Conference was conceived by a social worker who had been working with homeless men in fringe suburbs to the North of Melbourne. He believed that past strategic planning has been less than effective. As suggested on the flyer for this Search Conference:

*A common complaint is that when strategic planning has been completed in the past, few outcomes have been realised as subsequent action often depends on other groups or authorities beyond those taking part. Mostly, organisers have not engaged fully with the clients or consumers whom they service. Consequently, proposals lack a broad or sensitive perspective and often appear repetitive of previous strategic processes.*

As a result, he felt that a Search Conference would be a way to empower a group that is normally marginalised and whose voices are not usually heard.

Therefore, in 2003, he gathered a number of interested people (including representatives from: Aboriginal groups, the Northern Division of General Practice, the Northern Hospital, the local Community Health Centre, Whittlesea Shire and Community Information, Whittlesea to create a planning group to organise a Search Conference that would involve such men. He was also successful in gaining some funding from the Northern Metropolitan Primary Care Partnerships.

This steering group met for several months to plan for the conference. One of the first jobs was to set some aims for event. The group determined that the outcomes of the conference should be to:

- reduce housing concerns that many men face
- improve the health outcomes for these men
- to develop project teams of experts and consumers to work on any proposals put forward

Health was introduced into the equation as it was felt that housing and health affect one another. As a result the title became 'The Men's Health and Housing Project'.

There were also many debates about: how to attract the men to attend; who to choose as facilitator; where the event should be held; and how long the conference should be.

Eventually it was decided that:

- about 25 people should be invited. The aim was to have at least a half as homeless men and that some of these should come from the Aboriginal community. The remainder included an elder from the Aboriginal community, a GP, and someone from the Ministry of Housing.
- that various members of the planning group would engage with men to encourage them to come. For instance, members went to AA and NA groups
- there would be media and press releases
- that all the homeless should have any fare recompensed and that buses would go round to collect others
- that meals would be provided free of charge
- the facilitator should be a man (and so could relate more to homeless men). A short list of possible facilitators was drawn up and from these an experienced European who had run several prior search conferences was chosen. He also brought along a co-facilitator

- that the event should be held over two days and that these should be a Sunday 11 am-7pm and Monday 8-3pm so that professionals would only lose one working day.

Finding a venue with enough space, a kitchen and within budget proved difficult. But the local Council came to the rescue and provided a community room with kitchen facilities in learning Centre, for free. It also had the advantage of being easily accessible by public transport.

A pre-conference reading/resource pack was also prepared. It contained:

- a definition of homelessness
- statistics/local demographic details
- the Northern Metropolitan Region Victorian Homelessness Strategy
- the Victorian Homelessness Strategy
- the Youth Homelessness Strategy

### The Conference Process

The Search Conference order was modified slightly. It began by the facilitator setting the ground rules. Then attendees were divided into mixed groups of and given butchers' paper to draw diagram connections between health, the man and living conditions. They then came back into a plenary group to discuss the drawings. The afternoon was then spent in groups talking about the issues that had arisen from the activity. This brought together the current issues. By the end of the first afternoon these had been listed.

The second day began by summing up the previous day's findings. Then it moved on to how problems could be resolved. Groups were presented with a list of issues and were asked to work on them. This led to solutions being put forward. The last part was to form groups to work on particular issues after the conference.

### Outcomes

So by the end the Conference attendees had developed project teams to work on various proposals. During the next six months though, the all came together again so that by mid 2004 the group as a whole had developed a Strategic Plan that responded to the issues of men's health and homeless in the area. This had a public launch. It became a 'living document' and so at the ends of the year there was a secondary report and plan.

The group also instigated a monthly meeting where men were exhorted to "Stop Whinging and Do Something!" This group became known as The Northern Men's Home and Health User Group.

As time has gone on this group has gone on to work on other associated issues including  
 Difficulties for men to engage with existing services  
 Drugs and self-harm  
 Abuse

As one member of the team summarised “*networks between agencies, consumers have become intimately connected and worked in a more co-ordinated and organised way to meet housing and health needs of currently in appropriately housed men.*”

### Community Consultation to Plan for the Future of Bendigo

A year later, in 2005 community future search conference was held in Bendigo with the aim of influencing the area for years to come—hence the event was called ‘Bendigo +25’. Representatives from the local council and people with interests in sport and recreation, the environment, arts, youth, planning and business spent three days working through the future search. Again the order suggested above was changed a little so that the process began with reflections on the past and moved on to current and future issues.

The reason for holding this was that the Council had moved from seeing people merely as ratepayers to seeing them as customers with rights and ideas. Up to then most strategic planning had occurred behind the scenes in council offices and was then sent out for comment. This way of operating was largely about the inside directing the outside but then the Council wished to strengthen the connections with communities and to encourage collaboration. The CEO therefore encouraged the Council to organise the conference because of this and because of community criticism that it did not consult enough. He felt it was “*all about giving everybody a chance to get involved in the development of a vision and values that will guide future directions and decision-making for the region*”. (Rance, 2005)

Planning for the conference took several months and was undertaken by senior staff from the Council (including the Council’s communication officer), representatives from government departments, business and community and councillors gave their support.

The major facilitator, known to one of the Council staff was a former general manager of Launceston City Council and chairman of ‘Tasmania Together’ a project provided Tasmanians with a say in the island’s long-term future. He therefore was described as being able to “*help groups move from uncertainty to purpose.*” (Rance, 2005)

Identified concerns from the Conference included water, the environment, health services and potential overdevelopment. Although managing environmental challenges was regarded as complex people were generally optimistic about the future.

The outcome has been that views from the conference have been synthesised into a vision and values document and groups of participants are meeting regularly to follow up issues raised. Already the plans have influenced 2006’s budget process within Council and the CEO has reported that there are still community conversations focussing on what can happen.

### **Issues with Search Conferences**



In the literature there are concerns about:

- How well participants can maintain an awareness of, and integrate the huge amount of data produced throughout the process (in fact the facilitator and note takers are probably the ones who develop the greatest familiarity with it and use it for a later report)
- How much the participants use the data they produce to inform the recommendations.

There are also suggestions that:

- Participants are not informed enough about the constraints involved in implementing some of their proposals
- People do not really know their needs.

Some have also felt that it is a concept biased in favour of the more literate and articulate and unsuited for groups who lack facility with words and logic

When asked about what had been the issues in running these particular Search Conferences, these did not come to the fore. Organisers felt that the participants had coped with the input really well and come up with some realistic solutions which they were willing to work on. In fact the only concerns raised were that in the first example the Aboriginal group of homeless men often came in and out of sessions (*“but we just had to live with that”*) while with the second example *“It was difficult keeping up the momentum afterwards.”* Organisers were much more likely to talk about the advantages of this particular method. They felt that the advantages of Search Conferences are that they

- generate cooperative and purposeful activity
- become consciousness raising exercises
- identify strategic direction where there was little or none before
- set priorities for immediate and longer term actions.

They also said this activity contributes to:

- a clarification of values
- problem-solving
- conflict resolution
- team-building
- personal development (De Nitish, 1981)

Furthermore, in comparison with traditional top-down approaches to planning, the search conference appears better at gaining a commitment to plans and therefore in increasing the chances of implementation and use.

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