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A Brief Introduction to the Emerys' "Search Conferences."[1]

The main method for shaping the field in action research, later developed into action learning, involves active collaboration between clients and social scientists. This collaboration depends on joint agreements being worked out and revised as occasion warrants. Only material agreed by both sides is published. The Search Conference, as designed by the Emerys, is one of the main methods used. Projects involving search conferences are expected to last for a time, often a very considerable time. It is expected that differences between the parties will arise but that most of these will be resolved.

A search conference is a method which has been found to create conditions under which the multiple dimensions of complex issues can be cooperatively explored to a far higher degree than is usual, by members of the many and often divergent groups concerned. During the 1970s between 300 and 400 search conferences were held in Australia where the method was taken and elaborated by the Emerys after its small beginnings in the Tavistock. In the last five years some 30 search conferences have been held in Canada in organizations and setting of many kinds. The Faculty of Environmental Studies at York University has become interested in the method as a means of securing widespread public participation in the appreciation of complex issues, of evoking new ideas for their creative solution and of instigating processes of social

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[1]Taken from D. Morley and E. Trist, Children Our Number One Resource: A Report on the Saskatchewan Search Conference on Day Care. Saskatoon: Co-operative College of Canada, 1981. A full account will be given in Volume III.

learning which, in the long run, will increase the capability of the society to manage itself in the

uncertain, rapidly changing environment with which it is confronted.

A search conference depends, first of all, on getting the various parties at interest,

the *stakeholders,* together under some acceptable auspices in which there is enough trust for them

to agree to meet. The participants come as representatives of their organizations or as individuals

concerned with wider domains. As individuals they are much freer to undertake exploratory

work. The purpose of the search conference is to gain new understanding, to generate new

options and, through these, to create the possibility of more cohesive relationships among many

who have hitherto not been able to cooperate, through apparent incompatibility.

The role of the staff of a search conference is purely facilitative. They manage the

learning process, not the substance; a ground rule is that they must not interfere at all in the

content of the discussions. In this way, the participants experience full ownership of what is

produced and take full responsibility for it. As it is "theirs," they are more likely to feel

commitment to it and therefore to follow it up in their back-home settings or directly to suggest

steps which will allow it to come to fruition.

This is of special importance when many of the participants are grassroots people

without positions of prominence in any organization and who sometimes have never aired their

views in public before. In many circumstances the membership of a search conference is a mix

of such people along with organizational leaders at several levels. In the search conference

atmosphere they all have equal status.

When the membership is less than 20, the search conference can proceed through

all its phases in one total group. When it is larger--say, 40 or 60 members--most of the work is

done in small working groups of 10 or less, which report back their detailed work for general

discussion in plenary sessions.

To permit thorough exploration of multifaceted issues, search conferences require

a considerable commitment of time. Participants are required to come for the whole of the time.

Partial attendance is disruptive. It is difficult for a search conference to complete its task in less

than two-and-a-half days. A longer time period is prefered of three to four or, even, five days.

Moreover, new thinking of the type required cannot be done under conditions of

distraction, where the telephone can disturb or immediate demands of the office intrude.

Therefore, the conferences are best held under what is called "social island" conditions--in a

residential establishment at some distance from the participants' workplaces and homes, where

supporting services are available. The technology includes plentiful supplies of flipcharts, felt

pens and masking tape and secretarial services to permit outline records of each day's

proceedings to be available to all participants the next morning.

A brief record needs to be kept of meetings, decisions and other events with their

dates, so that a log becomes available on the course of the process for all concerned. A log-

keeper could function for, say, 10 weeks. These records give the outline of a learning

process--invaluable for analysis and comparison.

The search conference depends on a basic assumption that the future can, to a

considerable extent, be influenced by human intervention. There is no such thing as *the* future;

there are a number of possible futures. The job is actively to bring about the one desired, rather

than passively to be overwhelmed by one preferably avoided.

On the one hand, a search conference is future oriented, usually taking at least a

10 to 15 year time horizon. This is to unlock people from their immediate short-term

preoccupations. On the other hand, it seeks to have people relate the issue or problem with

which they are concerned to the wider society, to set it in its context, to take the wide as well as

the long view. However, the wide and long views must always be brought back to the present

and to the focal problem; toward the end of the conference the task has to be faced of agreeing on

action steps.

  The conference begins by having participants share their views on the main issues

and trends deriving from the past, which they feel are likely to go on influencing the future

during the next 10 to 15 years, and to identify new issues and trends, which they feel are likely to

emerge in this period. No one has a privileged insight into the future. Therefore, everyone's

views carry equal weight. Scanning the wider environment in a futures perspective is generalist

work. What influence people's actions are their beliefs and perceptions. It is these which need to

be shared publicly so that mutual ignorance of what participants think is replaced by public

knowledge. The material evoked by the facilitator is recorded on flipcharts without criticism or

debate.

  If small groups are necessary, they elect reporters to summarize the groups' work

for plenary sessions. All the flipcharts are hung around the walls so that they can be inspected by

everyone. This holds for all sessions. In this way, the participants find out what kind of world

they think is coming up, how far there is a shared view of this and what kind of large-scale forces

they will have to take into account in resolving the issue which concerns them or the organization

they wish to remodel.

  The second phase of the conference focuses on the issue or organization which is

the concern of the members. They are asked to build a picture of its present state and to analyze

how it came to be this way. They are then asked what is likely to happen to it, given the picture

of the large environment, if no changes are made. What is the degree of match or mismatch?

This usually leads to a consensus that change is required, but the question of

change is not approached directly. The third phase is concerned with forming a picture of what

the participants consider to be a desirable future for the organization, issue or domain with which

they are concerned. They are encouraged to think constraint-free, to dream but to remain

credible--not to become, in a false sense, utopian. Nevertheless, their task is to generate a

common vision that can motivate people to "invent" means of pursuing it that they would not

otherwise have thought of.

The fourth phase brings the participants back to the present. Having generated

their vision of a desirable future, what are the constraints which they see in the way of attaining

it? They must take into account here what they have said both about the present state of their

local organization or issue and of the trends coming up in the wider environment. But what also

are the opportunities, many of which may lie unrecognized? Some of the best opportunities may

be found by facing up to the constraints. Identifying a desirable long-range future usually has the

effect of narrowing the field of constraints and widening the field of opportunities.

So far, the conference has proceeded in the same general mode in the same small

groups, which are usually mixed groups composed of a cross section of the kinds of people

present. They may meet also in homogeneous groups to discuss constraints and opportunities

from a different set of perspectives.

For the fifth and last phase--the consideration of action steps--a basic change is

made in the mode of procedure. First of all, in a key plenary session, a set of themes is identified

in terms of which it is agreed that action of various kinds is required; these form the topics for

study by a number of theme or task groups. These groups are not the same as the initial search

groups but are composed of those most interested in a particular theme. The facilitators are then

withdrawn, and the new groups proceed entirely autonomously, thinking out their action steps in

the light of what has been learned from all the previous sessions. The action steps are usually in

terms of broad strategies geared to longer term, rather than shorter term, courses of action,

though some of the latter which are urgent may be included. There is great variation in search

conferences regarding how far task groups go in working out action steps. Unless thorough work

has been done on the desirable future and on constraints and opportunities, no new path into the

future will have been identified. Work on the proposals for action steps will tend to take two or

three sessions, at least.

A recent innovation in search conference procedure has been to invite senior

people from the domain of concern--politicians, senior government officials, senior corporate

executives and key interest group leaders--to attend the final plenary, to hear the presentations of

the task groups and to take part in the discussion. This makes the participants more accountable

to the key decision makers in their constituencies and exposes these decision makers to the

innovative thinking of the conference. Experience so far suggests that this step increases the

likelihood of implementation but whether or not to take it requires careful consideration. If it is

taken, a "dummy run" of the presentation may be made in-house before the visitors arrive. Many

conflicts often have to be resolved before the conference can turn to the outside world.

A search conference requires careful preparation and planning--jointly undertaken

by the staff and the sponsoring organizations--regarding who should be invited, how public it should be made, etc. A search conference is not an isolated event but an episode begun long before and continuing long afterward. It is of the utmost importance to ensure that means are found to keep the various groups in contact, to report back the proceedings effectively and to encourage the conditions that will allow a long-range shift in the field to take place, for search conferences are about substantial or fundamental change, not marginal or superficial change. Very often it is some time--many months or more than a year--before their impact becomes apparent. They have the delicate but necessary task of opening up new paths, of encouraging innovation without usurping the role of the organizations from which their members come. They have, rather, to change the relations between these organizations so that, within a new framework, they can accomplish what they were previously unable to do.