



## AFTER THE DANCE WITH FUTURE SEARCH

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Much thought has been given elsewhere to how large group events demonstrate principles of human systems dynamics (HSD) and how HSD explains why large group events work. Eoyang and Quade's work in *The Handbook of Large Group Methods*, Chapter "After the Dance" (Alban and Bunker, Wiley, 2006) began to explore how to sustain the work after the event but space was limited for that publication. This article delves more deeply into HSD principles and Future Search protocols, principles, and experience. You can find more information on Appreciative Inquiry, Open Space, and Whole Scale on [http://www.hsdinstitute.org/dept\\_press\\_publications.asp](http://www.hsdinstitute.org/dept_press_publications.asp). This article is designed to focus on the application of the Difference Matrix.

### **FUTURE SEARCH**

The term "future search" was first used by Marvin Weisbord in 1987 in his book, *In Productive Workplaces*, which described high participation models, cases and early experiments with future search. Much of this early future search work was based on the Emery/Trist Search Conference, as well as taking inspiration from Ronald Lippitt and Eva Schindler-Rainman's large-scale community futures conferences in North America during the 1970s. The work of Weisbord and Sandra Janoff resulted in the future search model which started with value-based action planning and evolved to its current form as a search by a diverse group of 65 or so stakeholders for common ground.

Future search can be used in any situation where it would be helpful to bring a diverse group together to find common ground and develop plans based on that common ground: creating and acting upon a shared future vision for the organization or community, discovering shared intentions and taking responsibility for plans, or implementing a shared vision that already exists. It is characterized by these conditions for success (Weisbord and Janoff, 1995, 2000):

- Getting the “whole system” in the room,
- All looking at the same “elephant” before working on any part of it (thinking globally before acting locally),
- Exploring current reality and common futures, not problems and conflicts,
- Self-managing your own groups and action plans,
- Attending the whole meeting,
- Meeting under healthy conditions,
- Working across three days (sleeping twice),
- Taking responsibility publicly for follow-up.

Often the “whole system” referred to above means stakeholders who might not typically be involved or even thought of, for instance, customers and suppliers. This diversity means “facing” and integrating the knowledge and perspective of people who care about the organization but might not usually be present. Future search also assumes that all participants have a valuable perspective and equal voice; therefore, there is less emphasis upon hearing from people at the top of the organization than in Whole Scale Change. A last notable characteristic is that future search uses techniques of self-management in sessions; namely, small groups run themselves, facilitate themselves, watch time, record, report out, etc. This means the role of the facilitator is closer to that of Open Space, setting the stage (container) for groups to do their work.

The basic structure of future search is Past, Present, Future. The section on the Past helps establish the common ground of people in the room by having people post personal, organizational, and global highlights on a Three Decades chart on the wall. The Present section has two parts, an internal and external look at existing conditions and environment. This section establishes both common ground and diverse perspectives. The Future section uses max mix groups (referenced in Whole Scale Change) to envision the future and ultimately describe that future creatively, without formal verbal report out. The last step is group formulation of and commitment to next steps. Weisbord and Janoff (2000) describe the whole design as a roller coaster going from get aboard, to despair to owning up to reality/dialogue to action. There are times in the process when there’s almost deliberate information overload or at least comfort with the discomfort of the group, which tends to jolt a group out of status quo thinking.

The originators of future search recommended a three-day (two overnights) process; however, others, including this author, have experimented with other timeframes and designs, including an appreciative inquiry approach instead of the “prouds and sorries” in the Present section, with favorable results. No matter the approach, the key learning is that the broad base of stakeholders seeking common ground through a self-managing process affords the consultant the opportunity to facilitate the movement of groups from difference to unity in a way that promotes commitment and action.

The purpose in this article is not to outline the specifics of future search but to focus on application of the Difference Matrix in the future search process. If you would like information about the method, consult *Future Search: An Action Guide to Finding Common Ground in Organizations & Communities* by Marvin Weisbord & Sandra Janoff, 2000.

## SETTING THE PATTERN

Taking a look at a future search intervention, we use the Difference Matrix (*Facilitating Organization Change*, Olson & Eoyang, 2000) as a primary lens. The Difference Matrix below focuses on two of the three conditions for self organizing, the D (Differences) and E (Exchanges) of CDE (see ...). This Matrix helps us understand and shape the dynamics of complex interactions. The quadrant diagram below makes this more explicit where we see the four combinations of amount of difference and the amount of interaction with positive and negative characteristics of each.

### THE DIFFERENCE MATRIX

	High Difference	Low Difference
High Interaction	1 + Learning + Growth + Self-organizing  -- Stress -- Conflict -- Exhaustion	2 + Celebration + Reinforcement + Energy  -- Low productivity -- Wasted energy -- Factions
Low Interaction	3 + Reflection + Safety + Clear the decks  -- Isolation -- Misunderstanding -- Frustration	4 + Comfort + Belonging + Rest & recovery  --Boredom --Stagnation --Death

So, for instance, the broad stakeholder base involved in a future search combined with the predominance of self managed small group exercises/dialogs results in high amounts of learning and growth, as well as self-organizing commitment to action. The down side is that the information overload in part of the future search process, such as summarizing the Three Decades exercise in the Past section, can be overwhelming, stress producing and exhausting. That is some of why the originators recommend three days and two sleepovers for future search; it gives time for processing and returning to the work fresh.

The remaining three quadrants above can also readily be seen, for instance, in a community college group doing future search with faculty and staff but without the benefit of community members, parents, employers, etc., which resulted in reinforcing each other's points of view, little productivity, and a remaining faculty – administration rift. An example of the lower left quadrant is the gatherings of environmental, development, and timber interests that don't allow for much listening and exchange of information, which seems safer at the time, but can increase the isolation and frustration. An example of the lower right is an all employee meeting with leaders to cover future direction where the stakeholders are all employees and the interaction is typically one way (from the leader) with a sprinkling of Q and A at the end. It's comforting because everyone knows their role and script but boring because everyone knows their role and script.

The Difference Matrix can be used not only to place an intervention like future search but to describe an organization or group's current and desired states, as well as providing thoughts around how to frame that movement. In the matrix below the quadrants are the same but include how to move clockwise in terms of amount of interaction and difference. So, for instance, the boring all-employee meeting which falls in Quadrant 4 might be more productive if varying employee perspectives were entertained and invited, even asking a group of employees to formulate the agenda.

### Changing Amounts of Difference and Interaction

	High Difference	Low Difference
High Interaction	<p>1</p> <p>To move to the right:</p> <ul style="list-style-type: none"> <li>• Focus on shared values</li> <li>• Tell a joke</li> <li>• Sing a song</li> <li>• Tell stories about shared past</li> </ul>	<p>2</p> <p>To move down:</p> <ul style="list-style-type: none"> <li>• Take a time out</li> <li>• Ask people to write/reflect</li> <li>• Table the issue</li> <li>• Change the subject</li> </ul>
Low Interaction	<p>3</p> <p>To move up:</p> <ul style="list-style-type: none"> <li>• Ask questions</li> <li>• Change the mode of exchange</li> <li>• Listen intently</li> <li>• Work with subgroups</li> <li>• Interview individuals</li> </ul>	<p>4</p> <p>To move to the left:</p> <ul style="list-style-type: none"> <li>• Push differences</li> <li>• Focus on individual agendas</li> <li>• Tell stories of personal past</li> <li>• Play a competitive game</li> </ul>

### CASE STUDY

A living example of this deliberate movement on the Difference Matrix is the community library in New Ulm, Minnesota, a town of 13,600 residents 90 miles from the Twin Cities, nestled in the scenic Minnesota River Valley. It was settled by German immigrants who not only continue to like their beer (home of Schell Brewery, the second largest operating family brewery in the United States) but also continue a strong tradition of learning and reading. The library, opened in 1937, has experienced leaps in circulation and variety of technologies in use while funding has decreased. This means that staff needed and wanted to keep advancing with technology, expanding accessibility in the community to an aging population, and still have a life. What seemed obvious as they looked to future planning is that as a staff they needed help; they couldn't do it alone. So they chose a future search approach which would move their planning process from Low to High Difference and Interaction, getting them the community buy in and commitment they needed and providing a patron perspective to jolt them out of the status quo of overwork.

The outcomes, for instance, included plans for establishing a Friends of the Library group to help with outreach and funding, moving toward WiFi throughout the library, and focusing on a welcoming environment that will eventually include a coffee shop atmosphere for informal get togethers. This couldn't have happened without the broad base of stakeholders, including students, present and the self managing aspects of max mix groups envisioning possible futures.

## HOLDING THE PATTERN

It's important to note that a portion of their outcomes rely upon continued involvement of the broad stakeholder base, for instance, establishment of the Friends group. But the reality is that the staff's day-to-day world returns to Quadrant 4, low difference and low interaction. That means that sustainability is an issue, that the fading energy of broad stakeholder involvement and high interaction is moving them away from Quadrant 1 to 4. As a result, it will help them to use the Decision Matrix to plan their conscious movement around the matrix, intentionally increasing stakeholder involvement at key points, such as planning for and carrying out segments of the strategic plan, or infusing varied ideas into the mix as they think through the implementation of the coffee house atmosphere.

It may also help them to use the Landscape Diagram (see article on Open Space) to think about what in their work needs to be organized and controlled and what needs to be self-organizing. The tendency of their profession will otherwise prevail to assume that everything should be procedural and controlled, including patrons and their coffee cups.

## OTHER DANCES

In the case of the New Ulm Public Library, the Difference Matrix provides a framework for understanding how levels of difference and interaction can be used to better achieve outcomes of strategic planning. The Matrix can, however, be used to provide the same context for thinking through design of a meeting (such as the all-employee meeting), diagnosing why something may not be working well (product design team that has too many meetings), thinking through an organizational shift (such as how and when to engage employees in a change initiative), or re-structuring how a group gets its work done (such as an individually isolated software development group). The Difference Matrix is, however, not the only lens to use in these situations, but provides a simple yet valuable perspective.

The Decision Matrix below is offered as a worksheet to plot current organizational situations and think through, preferably with a representative group of stakeholders, what's working, what's not and where some movement in interaction and/or differences might enhance the situation. For instance the software development group cited above might actually discover through discussion and plotting work habits on the Matrix that there are only certain occasions when the group is working too individually and needs more interaction – not that they need more interaction across the board.

	High Difference	Low Difference
High Interaction	1 <ul style="list-style-type: none"> <li>• If conflict seems to be getting in the way, do we need to acknowledge and validate our differences?</li> <li>• If we're exhausted, are we interacting too much and/or not giving our selves time to process.</li> <li>• Could we be more self managing? Do we rely on management too much?</li> <li>• We aren't growing and learning; why not?</li> </ul>	2 <ul style="list-style-type: none"> <li>• Are we too much alike? What could we do to increase difference or involve other stakeholders?</li> <li>• Do we meet too much? When do we need to meet?</li> <li>• Do we have factions? What value could other stakeholders bring?</li> <li>• Are we into Group Think?</li> </ul>
Low Interaction	3 <ul style="list-style-type: none"> <li>• Are we doing individual work at the right time?</li> <li>• Do we do re-work because we don't communicate with each other enough?</li> <li>• Do we apply what we learn and know from reflection?</li> <li>• Do we feel too safe and complacent?</li> </ul>	4 <ul style="list-style-type: none"> <li>• Are we too comfortable? How do others perceive us?</li> <li>• When was the last time we genuinely got excited about something new?</li> <li>• Are we connected enough to our customers?</li> <li>• Do we love to come to work?</li> </ul>

Each quadrant contains a few key questions which may help get thinking and discussion started. The questions are from the perspective of a group working together but can easily be adapted to an individual or an organization as a whole. All can benefit from examining the interplay, and sometimes balance, of differences and interaction.

## SUMMARY

This article explores applications of one HSD concept, the Difference Matrix, to conducting Future Search large group events and to enhancing the long-term effectiveness of the events. The Matrix, representing organizational dynamics in terms of low or high Difference and low or high Interaction (Exchanges), is used as a four quadrant model for organization analysis and design of the Future Search to show how it would best be used in each particular situation. The Matrix is then viewed as a guide to organization changes—movements from one quadrant to another-- that will facilitate follow through on decisions made during the event and maintain the energy and ideas needed for implementation. These applications on the Decision Matrix are illustrated through analysis of a case study using Future Search for strategic planning. Finally, the Matrix is presented as a tool for self-diagnosis by groups and organizations to determine possible changes in Differences and Interaction that might improve their effectiveness.