



# SEARCHING FOR RESPONSES TO POVERTY

OP2000 uses a planning  
process designed for  
multi-stakeholder  
situations & initiatives

by Leslie Benecki & Eric Leviten

**W**hat would Waterloo Region look like if there was no one living in poverty? What are the obstacles to achieving this desirable future? What steps need to be taken to make this vision a reality?

This past January, nearly 50 people representing a broad cross-section of the local community assembled to tackle these challenging questions in Waterloo, Ontario. They were brought together by Opportunities 2000 (OP2000), a community-based poverty reduction project sponsored by the Lutherwood Community Opportunities Development Association (see *Making Waves*, Vol. 9, No. 2, Summer 1998). The event employed an innovative planning process known as the “search conference.” Used successfully in many different settings over the past 30 years, the search conference format enables diverse participants to recognize their common stake in a complex issue. Participants begin by exploring the broad, long-term factors shaping their situation and gradually identify specific ways they can work together to create the future they desire.

Undaunted by a winter storm that wrought havoc throughout southern Ontario, representatives from key sectors of Waterloo Region - people in poverty, nonprofit organizations, business, and government - dedicated themselves to two intense days of discussion.

OP2000 is still feeling the conference's impact. Quite apart from the wealth of ideas it generated, the event helped to consolidate a shift in the very concept of OP2000 (just the effect which the search conference methodology was intended to achieve).

#### SEARCHING FOR SOLUTIONS IN A TURBULENT ENVIRONMENT

The search conference is a participatory planning process developed by applied researchers with the Tavistock Institute of Human Relations in London, England. Its methodology was formulated in the 1960s and refined in both theory and practice during subsequent decades. It has been employed in industrialized countries and the Third World to address issues ranging from health care and the environment to technological change and economic development.

The search conference was developed in response to what its originators called a "turbulent environment." Turbulence occurs in social settings which may be described as "intricate." Organizations in such settings are so interdependent that action taken by any one agency sets off waves of action and reaction on the part of others.

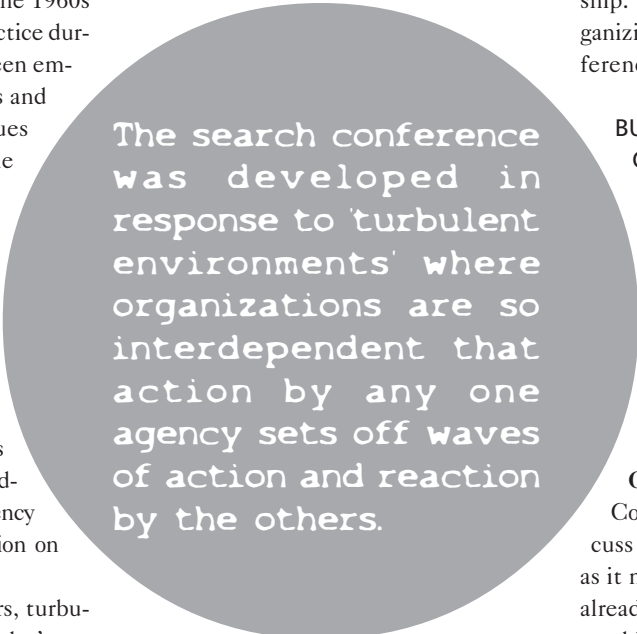
In the view of these researchers, turbulence is *the* defining feature of today's social environment and poses important challenges for organizational and social planning. In the past, the social environment was sufficiently stable and predictable that conventional planning techniques could be effective. An organization could determine its goals and devise plans to achieve them. In a turbulent environment, individual organizations have less control over their own circumstances. Their destinies are more closely tied to the actions taken by others. Organizational independence is constrained; collaboration with others is increasingly necessary.

What distinguishes the search conference planning process is precisely this focus on multi-stakeholder collaboration. The technique's first aim is to enable participants to

appreciate more fully their interdependence in relation to a complex issue. On the basis of such an understanding, it then encourages participants to jointly set directions for the co-operative management of their shared concern.

#### POVERTY AS A COMMUNITY PROBLEM

The impetus behind the Opportunities 2000 project was Lutherwood CODA's recognition that poverty was the sort of problem which no individual organization could



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solve on its own. Prior to their merger, both Lutherwood and CODA were highly successful nonprofit agencies helping people to meet their employment needs and providing a wide range of other human services. Despite the success of their respective programs, each recognized that it was making a relatively small dent on the issues it was addressing. In 1997, the two organizations agreed to merge in the hope of achieving both greater scale and new synergies.

With Opportunities 2000, Lutherwood CODA took the search for scale and synergies a step further by engaging an array of other agencies in a concerted effort to combat regional poverty. At first, OP2000's role was to provide technical as-

sistance and other supports to nonprofit agencies interested in creating economic opportunities for people living on low incomes. Gradually, however, the sponsors recognized that a fully multi-sectoral approach was required, involving four key groups: low-income people, nonprofit organizations, business, and government.

Developing such a multisectoral approach required Lutherwood CODA to become what the Tavistock Institute would call a "domain organizer." Its OP2000 staff increasingly assumed the role of catalyst, animator, and facilitator of a complex partnership. In doing so, staff sought out new organizing tools, among them the search conference.

#### BUILDING MULTISTAKEHOLDER COLLABORATION

Arranging the Waterloo Region conference highlighted a number of factors important to building multi-stakeholder collaboration in general and employing the search conference methodology in particular.

##### Convening the Stakeholders

Convening diverse stakeholders to discuss a common concern is not as simple as it might seem. If the stakeholders were already working well together, the event wouldn't be necessary in the first place. In some instances, they may simply be isolated from each other; in others, they may be locked in adversarial relations. In either case, an intervention is needed to move people toward collaboration.

In Waterloo Region, OP2000 was able to play the convenor role because of its strong reputation and its substantial contact with the four key stakeholder groups. At the same time, Lutherwood CODA had to make a concerted effort to develop trust with the prospective participants. Lutherwood CODA was not a neutral third party in relation to the poverty issue, but a stakeholder in its own right. Particularly with other nonprofit organizations, it had a history that included points of tension as well as harmony. Significantly, the search conference

was convened some 18 months after OP2000 commenced. By this point, most of the conference participants had already been engaged as formal or informal partners in the OP2000 initiative.

### Selecting Participants

The overall objective in identifying participants for a search conference is to ensure that the deliberations fully reflect the complexity of the situation itself. Different stakeholders appreciate different dimensions of their shared reality. By exploring their diverse perspectives, participants can build up a more comprehensive understanding of the challenges they face. The more fully the situation is appreciated, the more effective stakeholders can be in devising solutions.

Generally, a search conference should not include more than 25 participants. Beyond this point, group dynamics can significantly complicate proceedings. That being said, conference sponsors often find it impossible to limit participation to this level. There is a natural desire to include all the individuals and organizations who would make a valuable contribution and to exclude no one whose participation will eventually be needed. In the case of OP2000, the line was finally drawn at nearly 50 participants.

### Time & Place

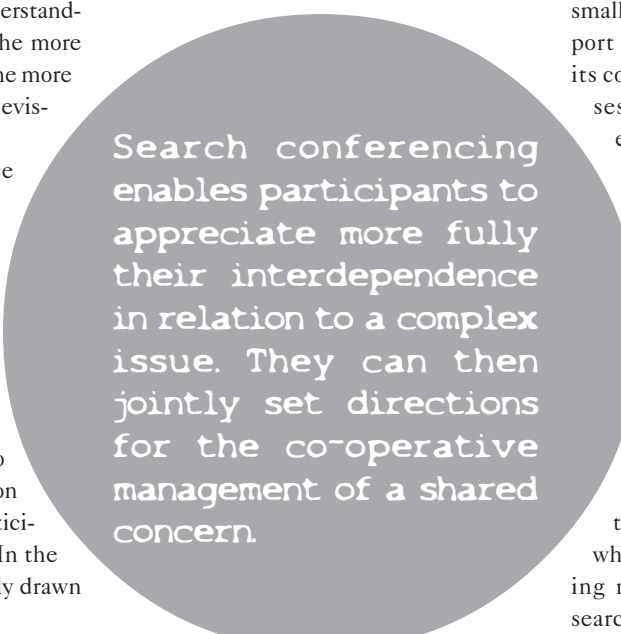
The event itself requires at least two days to complete. Time is required for participants to develop relationships with one another, to share their diverse perspectives, and to synthesize all that they are learning. Breakthroughs occur in search conferences when participants begin to put the pieces of the puzzle together in new ways. Given the intensity of the process, “social island” conditions are to be recommended, for they help participants to concentrate fully on the issues at hand. Search conferences are often held in retreats which provide meals and accommodation so that participants can temporarily escape their routine responsibilities and preoccupations.

In Waterloo Region, the conference was

scheduled to last for two days but was foreshortened somewhat by the threatening weather. Perhaps for this reason, the conference was stronger in producing an abundance of ideas and insights than in forging a synthesis or action plan. Additional time may have allowed participants to perceive more clearly the main threads of their joint analysis and the key ingredients of a collective action plan.

### Organizational Affiliation

While individuals from a variety of organizations are invited to participate in the



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search conference, they are not asked to serve as formal representatives of those organizations. They attend instead as individuals with all of the knowledge and experience they have acquired as participants in the field. By encouraging participants to leave their organizational “hats” at the door, a more free-wheeling exploration of the issues may be achieved. Points of view which normally fall outside established organizational positions can be considered. In Waterloo Region, some felt that this latitude helped conference participants to achieve a remarkably high degree of consensus.

### Conference Format

The search conference employs a partici-

patory process. Although guest speakers are sometimes featured (as they were at the Waterloo Region event), it is clear that the “real experts” are the stakeholders themselves. Most of the work is carried out in small groups of 6-8 people, structured to include representatives from each of the key stakeholder groups. In plenary sessions, the groups share the highlights of their deliberations with one another so that an overall conference perspective is developed. While facilitators are usually involved in guiding both the work of the entire conference and the small groups, their responsibility is to support the conference process, not to shape its content. Stakeholders are seen as possessing the basic knowledge, experience, and will needed to assess the present situation and to determine a course toward a desirable future.

### Conference Structure

The search conference process is premised on the notion that human beings are purposive and ideal-seeking - we are capable of acting deliberately to create the futures we desire. The challenge is to bring this positive, constructive energy to the fore among people who do not currently have close working relationships. To accomplish this, search conferences typically address five questions in the following sequence:

1. What are the broad environmental factors and the long-term trends shaping the present situation?
2. What is the probable future if no specific intervention is initiated?
3. What is the future we desire?
4. What are the opportunities and constraints which respectively support or work against the realization of this desirable future?
5. What specific steps should be taken to achieve the desired outcomes?

This design is intended not just to help participants to recognize their interdependence and the potential for collaboration, but also to demonstrate how they can together take practical measures to realize a common goal.

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For more about OP2000 or the Caledon Institute, visit [www.op2000.org](http://www.op2000.org) and [www.caledoninst.org](http://www.caledoninst.org).

## COUNTERING POVERTY IN WATERLOO REGION

The Waterloo Region search conference identified several major changes in the wider social environment which have had a profound impact on the poverty issue locally.

First, the emergence of the global market has diminished the power of the nation-state. In response to new competitive pressures, national governments have sought to create attractive environments for business and investment. In the process, many have significantly curtailed the role of government, adopting aggressive deficit reduction programs featuring dramatic reductions in social spending.

Second, the emergence of the knowledge-based economy has created new struggles for many citizens. Older workers strive to stay abreast of changing skill requirements. Young people strain to finance the education which is increasingly critical to their economic well-being. All workers face a labour market consisting of relatively few "good jobs" and a growing number of "bad jobs" (i.e., low-skilled, low-wage, part-time jobs with few, if any, benefits). Social tensions have intensified both as the gap between the rich and poor widens and as more people compete with one another for marginal economic opportunities.

Conference participants also identified how each of the key stakeholder groups has been adversely affected by these broad social changes. Local governments strain under the weight of responsibilities downloaded from federal and provincial governments. Private charities and nonprofits see workers and volunteers burn out as they struggle to respond to needs far greater than the resources at their disposal. Businesses encounter the downside of restrained social spending, including mounting social problems, declining quality of community life, and the prospect of a less productive labour force. Most significantly, low-income people strive to meet their needs in a less supportive, at times distinctly hostile, environment.

Confronted with this difficult reality, participants recalled how the community had overcome significant challenges in the past. The key was in devising new, more effective ways of working together. Improved collabo-

ration among all sectors of the community would allow the whole to accomplish what the parts could not achieve alone.

In the latter stages of the conference, participants began to imagine specific initiatives through which they could collectively create more viable social arrangements. Nonprofits and business could become partners in the design and delivery of customized training programs for the unemployed. Local government could use its clout to create a unified public transportation system so that people could travel easily to employment and training opportunities in all parts of the region. Social assistance benefits could be adjusted to provide the supports needed for people to make a smooth transition from social assistance to employment. Low-income households could be supported in building assets to be invested in affordable housing, training, education or enterprise development. Business people could act on their heightened sensitivity to poverty issues by reviewing and adjusting their human resource policies. Community volunteers could support the efforts of low-income residents in numerous ways, serving as literacy tutors or job mentors, for instance.

## CONCLUSION

It is not in what people discover in their minds which makes search conferencing different. It is what they find in their hearts and souls and ultimately the commitment to a better future.

The Waterloo Region search conference did not bring into being miraculous new ideas for social and economic development. Rather, it gave re-birth to the old, but recurring, idea of community. By entering into new relations with one another, we can shape the social realities in which our lives unfold.

In retrospect, the value of the Waterloo Region search conference lay in creating a context in which this sensibility could be articulated more fully. For Opportunities 2000, the conference confirmed the search for multisectoral partnership as the strategy for long-term poverty reduction. Adding meat to those bones has become the on-going task of the OP2000 initiative. 