

Future Search in Nonprofits

By Marvin Weisbord and Members of Future Search Network

For more than a decade hundreds of consultants around the world have used future search as a strategic planning method to help organizations and communities translate vision into action. In this article, experienced members of Future Search Network talk about some of the strategies we utilize to live out the core principles that account for the success of future search in diverse cultures. These principles apply to many meetings and change strategies. We practice them all the time whether we are doing future searches or not. Below are excerpts from an email dialogue among FSN members on effective uses of future search principles in the non-profit world.

Principle One – Getting the Whole System in the Room.

Getting the “whole system” in one room our core change strategy, making possible constructive action once thought impossible. Most of us now seek intuitively to get people with authority, resources, expertise, information and need into the same meeting when the stakes are high and time is short. Thus, we make “systems thinking” experiential, not just conceptual. The people involved *are* each other’s environment. Instead of “scanning the environment” on flip charts, they talk to one another. This practice has major benefits.

Enhancing Strategic Planning. Barry Bateman, of SiloSmashers, in Vienna, VA, for example, started working with non-profits 30 years ago. “Not much has changed in non-profits’ issues,” said Barry, “including strategic planning processes, which, while highly participatory, may have little to do with what really goes on. Non-profits are pulled in so many directions by the ‘stakes’ of their ‘stakeholders’ that focused discipline is always an elusive goal.”

He highlighted the perennial board-staff conflict. “Fulltime staff usually have a better idea than most volunteers of what needs to be done to protect the non-



profit’s charter and advance its interests. Board members often have personal agendas and tend to hold on tight to authority. They are volunteers themselves, after all, and need some personal payoff to stay in the game. Sometimes they try to keep the staff out of key decisions. So strategic planning can be a two-step forward, one-step back process.”

Barry pointed out that getting a whole system in the room can enhance both board and staff members’ authority. What had been a zero-sum game becomes a larger pie for which more people take responsibility, greatly enhancing a non-profit’s influence.

By way of example, he said, “For years, the World Bank’s process for providing financial and technical support was criticized as cumbersome, exclusive, and non-transparent. In the mid-90’s, the Bank began experimenting with participative methods to develop country strategies. Applying the principles of Future Search was one of the few methods that produced real consensus on country strategies.

“The bank brought citizen stakeholders, financial institutions, government officials and private industry into strategic planning. The results were better strategies supported from top to bottom. And many noticed a key intangible: energy was released within communities that converted finger pointing into problem solving.

Nothing gratifies consultants more than seeing their efforts pay off for clients. At the World Bank, participation and transparency have become watchwords for the future and future search has played no small part in getting there.”

Superior Client Services. “I have been consulting for a Pew-funded collaborative, interorganizational project among three non-profit organizations called Families Without Violence,” reported Jane Weiss, a Philadelphia, Penna. consultant. “An agency that provides legal

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representation to children is working with two other agencies that serve the non-abusive parent (99.9% of the time the mother). Traditionally, children's agencies have practices at odds with those serving parents. This project seeks common ground among the three organizations.

"In this population (and others served by non-profits)," Jane continued, "I am struck by how consumers have to negotiate *manysystems* that are not working together. These clients, for example, could be dealing with the criminal justice system, the welfare system, Department of Human Services, and/or the school system."

Nancy Aronson, a principal in Arsh/Arson, Malvern, Penna., helped the Chamber of Commerce in Olathe, Kansas, a city of 100,000, to sponsor a future search seeking alignment among many local institutions.

They recruited as co-sponsors the school district, a local healthcare organization, an influential university, and the mayor's office. "They all agreed to incorporate the outcomes of the future search in their respective strategic plans," said Nancy. "This represented a powerful community collaboration. It brought many key community people to the table and demonstrated an upfront commitment to use the results and to take action--a strong message to the entire community."

Influencing Public Policy. Bonnie Olson, of Emerging Design Consulting, Seattle, Wash., pointed out that many non-profits exist to affect public policy and societal change. "I work with advocacy organizations and coalitions," she said. "Those that include the wider community in strategic planning develop strong partnerships."

Even public officials, funders and other agencies become part of the 'we,' identifying with an organization's mission when they have helped to shape its strategy. In health and human services, few can go it alone. Creating strategies to support children, families, community health, and so on, often requires linkages between multiple services and community resources.

Agencies with tight resources can't pay for all the services required for their populations. They must rely on good will for these linkages. Strategic planning with all the community partners is critical in this time of heightened stress, decreasing resources and multiple needs."

Principle Two – Exploring the Whole Before Fixing Any Part.

Hardly a consultant has lived who is not familiar with "conflict management" meetings in which the parties talk past one another, each focused on a different part of an issue that includes multiple realities.

Future search techniques—timelines, mindmaps, future scenarios, 'prouds and sorries,' common ground wall—all serve the function of getting everybody talking about the *same* world. Network members have adapted these techniques widely in non-profits because of their power to focus people on common goals.

Redefining a System's Boundaries. Bonnie Olson made the point that non-profits often don't realize how many lives they touch. "I take non-profits through a visual exercise to map out how extensive their own networks are," said Bonnie. "Many think of their organization as staff, board, and clients. When they map their networks, they realize they are bigger than they thought. This is a very powerful insight."

In addition, directly involving all stakeholders in strategic planning "always magnifies the reach of the vision and the impact of the strategies. Non-profits learn a lot from hearing how they are seen by volunteers, clients, partner agencies, and funders. Often they find they have many more resources to implement their strategies than the finite pot they might have perceived at the start."

Preparing the Dialogue. Having the whole system in the room is essential to thinking globally before local action. Such diversity also can heighten tensions.

Martha Fleetwood, Executive Director of Home-Base/The Center for Common Concerns, in San Francisco, Calif., zeroed in on the paradoxes of "community-wide strategic planning where several non-profits are participating." In such cases, she said, "we pay special attention to the dynamics because local government contracting agents and other funders are always present."

How can we create space for the beholden non-profits, as well as their clients, "to speak freely and honestly, without fearing repercussions"? Marty's solution

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is “a lot of prep work to synthesize perspectives, and remove personal identities from the points being made. We conduct interviews, research the agency and its problem, and prepare an anonymous summary of the issues organized thematically. This forms the basis for dialogue in the strategic planning meeting, at which point speakers are free to claim their points previously made, or to re-articulate an issue.” She does similar preparation work with non-profit consumers, enabling concerns to be heard without attribution until the person with the issue feels free to claim ownership.

Principle 3 – Focusing on Common Ground and the Future

Belinda Loftus, of Arts & Community Development, in County Down, Northern Ireland, was the only member to take this one on during the email dialogue. She provided a useful tip for those who wonder how to deal with conflicts that may prevent a conference from going forward.

There are, said Belinda, “awkward customers and issues” that may come up at any point to inhibit a strategic planning meeting. In future search, the ground rule is that all issues may be raised, and that problems and conflicts will be treated as information, not action agendas.

The core agenda is common ground and future plans. To cope with such issues that may stall an ongoing consultation, Belinda seeks to have the clients agree to a “time-limited time out” during which people may air their issues with the facilitators outside the formal planning process if they choose. The meeting then resumes seeking common ground.

Principle 4 – Fostering Self-Management and Responsibility for Action

One objective of future search facilitation is to help clients manage their own affairs and take responsibility for action. Several FSN members pointed out that often volunteers and community members are not used to taking responsibility, looking instead to leaders, staff and consultants for action. We strongly resist the temptation to fill the vacuum.

Reducing Dependency.

“I have little business experience,” noted Kenoli Oleari of Horizons of Change, Berkeley, Calif. “The business consultants I have worked with in non-profit/community settings are not prepared for the degree to which people **don’t** follow through on commitments.

“Often, a non-profit future search planning team involves community members who are not used to taking initiative or being responsible for follow through. This can be frustrating. Sometimes a lot falls on the shoulders of a few paid people or those who are just more responsible or empowered.”

Kenoli adds, “People are often over-extended and ‘additional’ commitments,

like being part of a planning team, may go on a back burner. Commitment among volunteer or over-extended activists is not predictable. I seek to deal with this by continually holding up the ultimate vision and passion that drives the task. I also advocate choosing planning team members who both meet the stakeholder requirements and have the capacity to follow through on commitments.”

Dealing with Ambiguity. Jean Katz, of Jean Katz Consulting in Los Angeles, Calif., is a veteran strategic planner with school districts, schools, Head Start, and other social agencies.

Future Search Principles

Get the “whole system” in the room. The quotes imply that we never get everybody. It is possible, though, to have in the same room people with authority, resources, expertise, information, and need. Simply calling such a meeting is itself a radical change making possible many others.

Explore the whole before seeking to fix any part. Each person has a part of the whole. When all put in what they know, every person has a picture none had coming in, and they can plan together in a shared context rather than on disparate agendas.

Put the future and common ground front and center. You can’t chew gum and whistle. So problems and conflicts become information to be shared, not action items;

Invite self-management and personal responsibility for action. Groups are capable of a great deal more than they customarily are asked to do. Each time a manager or consultant does something for a group they deprive others of a chance to be responsible.

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She pointed out a frequent ambiguity in non-profits that may also undermine committed action.

“Sometimes,” said Jean, “lines of authority are not clear between the boards and staff. Sometimes boards are too intrusive in staff roles, and sometimes they do not wish to release decision making authority to other groups.” So they may do strategic planning as public relations window-dressing. “The meeting looks inclusive,” said Jean, “but follow-up doesn’t occur.”

The antidote to this reality is a frank, up-front conversation about “who has authority to act on the vision and action plans that come out of the meeting. Unless planning includes this step a non-profit consultant runs the risk of helping to reinforce widespread cynicism about meetings that lead nowhere.”

Keeping the Energy Flowing. Many people wonder how to keep energy flowing and action plans moving after a strategic planning meeting. Centralizing and controlling follow-up usually means the death of commitment and collaboration. Keeping coordination, control and leadership in the hands of those directly involved can have considerable pay-off.

Jean-Pierre Beaulieu, Conseil En Gestion, Inc., Brossard, Quebec, Canada, has had both experiences working with hospitals. “In one large hospital,” he wrote, “planning was driven by the ‘directeur général’ who was very effective during and right after the workshop. However, everything came to a halt when the top person and senior management tried to implement some controversial elements of their future scenario without involving the stakeholders who had helped create it.

He contrasted this with a second hospital where Coordinating Team members knew in advance that they would be involved in follow-up.

Afterwards, they worked with Task Forces to plan for key issues emerging from their future search. “The Team members took their mandate seriously,” Jean-Pierre said. “Not only did they keep the Task Forces on track but whenever they felt that top management had moved on to short term crisis agendas at the expense of longer term strategic issues, they made enough noise in the organization to focus their attention on the long

run.” In short, they did not leave the job to top management alone.

Power and Powerlessness. Finally, powerless groups may opt for partisanship over collaboration and responsibility for the common good.

Kenoli Oleari mentioned a dramatic collaborative dilemma in a future search with a small California school district. “We met a lot of resistance,” he recalled, “from community activists and students used to feeling disenfranchised.”

Asked to collaborate in the school district’s future rather than advocate a hard line position, “these groups felt that they would have to give up the very leverage that gave them a voice in the issue.

In some ways, they wanted to be **the** voice, not just **one of many** voices that could be lost in the crowd. The holders of power,” Kenoli concluded, “will respond to the possibility of collaboration in one of two ways. They will be oblivious to the benefits: after all, they have the power, why share it? Or they may see how bringing in more voices adds credibility to important work.

“Some may find this latter risk small because they believe that they can control the situation if need be. Advocates may simply pursue their own pet projects together,” pointed out Kenoli, “ignoring the potential for action on common ground.”

In the school district future search, the solution was to “organize action planning around common ground themes identified as critical by all participants. The result was a range of ideas for projects that got some of the most resistant voices excited about working with new partners. It also resulted in spreading a range of voices into associations they might not normally choose for action planning.”

Clarifying Board Roles. Network members have had experience with many generic non-profit issues that inhibit effective strategic planning, involving key leaders and Boards of Trustees.

Here are examples from a consultant experienced in both business and non-profit realms: “I am struck by the lack of clarity around roles and responsibilities [in many non-profits],” wrote Claudia E. Cohen, of Insightful Business Solutions, Westfield, N.J. “I found this

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confusion in three quite different Boards of Trustees—a large religious congregation, a community organization, and a public library.

All were reluctant to address their ambiguities. Even where roles were documented (e.g. the congregation's by-laws), people were not conversant with the scope of the role of, say, the minister, and when presented with the written description, seemed reluctant to respond or to clarify.

With the library, there was role confusion between the Executive Director and the Board on the Board's evolving role. From a strategic planning perspective, I felt obliged to put roles and responsibilities on the table and encourage serious conversations.

"I also have encountered what is called 'Founder's Syndrome,'" said Claudia. "In the community organization [mentioned above], the Executive Director founded it 20 years ago, devoted his life to it and showed no signs of quitting.

"When Board members suggested new strategies for growth, he was unresponsive and defensive. To accept key suggestions for stewardship would require clear and consistent delegation, empowering others, and crisper definition of roles and responsibilities. In this case we worked to help activate existing Board Committees focusing on stewardship issues.


"As the Board Members met and strategized, their voices became more aligned. I now see some progress in the founder's willingness to accept input from Board Members, especially as he sees a direct connection with such important goals as winning funding and attracting donations."

Change Means Doing Something New. Anne Gardon, of Strategies for Change, Poughkeepsie, N.Y., highlighted some sources of reluctance to act. "Future search and other whole-system approaches," she noted, "have given me tools to help non-profits think outside their boundaries and employ new practices for planning and decision-making.

Many non-profits, though they speak of clients, funders, consumers, and stakeholders, often practice closed thinking and decision-making. Inviting different stakeholders into the same room is often perceived as radical and 'too big a step.'

"Why? I see several forces at work: tensions between board and staff, competition for (now scarce) re-

sources, fear of getting into political hot water. I think their reluctance often comes down to power and control. Who has it? Who doesn't? In whose moral interests do we operate? Or not? Who owns this agency/mission/issue? What happens if all these issues on the table relate to large, deeply systemic problems, like poverty and injustice that are way beyond the scope of our mission? Of course, when they actually take that step and involve multiple perspectives they usually are blown away by how much they learn and how rich it becomes.

"I think this is hard stuff for those of us consulting to non-profits," Anne concluded. "Personally I am dedicated to figuring out ways to help non-profits and communities acknowledge the complexities and their multiple realities, hopefully leading to new ways of thinking and acting to validate the humble steps we take." 

Marvin Weisbord is co-director with Sandra Janoff of Future Search Network, a consortium of 350 practitioners dedicated to community service, mutual support, and learning. He was an OD consultant for many years and is author of Organizational Diagnosis (Addison-Wesley, 1978), Discovering Common Ground (Berrett-Koehler, 1992), and a forthcoming revision of his 1987 book retitled Productive Workplaces Revisited (Jossey-Bass, 2004). He and Janoff co-authored Future Search: An Action Guide (Berrett-Koehler, 2000). Contact the Future Search Network at www.futuresearch.net.

Future Search Network is an international volunteer non-profit service agency helping organizations and communities with strategic planning. Our core methodology, "future search," is an 18-hour planning meeting of 60 to 70 diverse stakeholders. Together people explore the past, present and future of their chosen focus, determine their common ground, and immediately make action plans. The Network puts on future searches in the public, non-profit and NGO sectors anywhere in the world for whatever people can afford. Our members include some of the most experienced consultants anywhere. We engage in a continuous dialogue about techniques congruent with our values, and about what works and what doesn't.