

Strategy to turn natural people of the land into obedient subjects
What are our weaknesses? Adapting us to NWO.

The Search Conference Method for Participative

Going on in
Kahnawake since
1990

Planning

Watch & you will see
the 'method' at work!

Robert Rehm and Nancy Cebula

Adapted from the article The Search Conference: State of the Art

by Merrelyn Emery

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New World Orders - Testing brainwashing system, fine tuning development
Restructuring onkwé 'hon: weh mind
from communal to corporate control by a few.

The Search Conference is a participative planning method that enables people to create a plan for the most desirable future of their community or organisation, a plan they take responsibility for carrying out themselves.

chosen - by band council

In a Search Conference, people (citizens, community leaders, managers, workers) become a planning community. Together they create a plan for the future, based on shared human ideals, that they can live for and work to implement. The Search Conference makes it possible for any kind of system, whether community or workplace, to thrive in the face of uncertain, turbulent times.

they work for
the military

The Search Conference has been used around the world for more than 30 years. Fred Emery and Eric Trist introduced the first Search Conference in 1959 to merge two aircraft engine manufacturers in Great Britain. Fred and Merrelyn Emery have continued to research and develop the method ever since. The Search Conferences has become popular in the USA in recent years with successful applications in business, communities, and government.

Purposes and Types of Search Conferences

away from
Kahnawake

The Search Conference is useful for setting new policy directions, and strategies in any sector, public or private; for finding common ground on difficult social conflicts; for developing or reforming communities, organisations, or industries. It works for any system coming together around a common purpose and looking for a desirable future.

start with small system & work out to the rest.

The Search Conference brings to life the concept called open systems, suggesting that any system has an open and direct relationship with its larger social environment. We use the term system to mean any organisation, community or network that draws a boundary around itself to establish its relationship to its environment. Environment means everything outside the system. It includes all the aspects of global society that are changing so fast, as well as those things that are unchanging such as: increasing global economic development, population growth, and communications superhighway, to name a few.

The method is ideal for the following systems:

concern over our resources, population
surveillance

- Communities and regions wanting to bring together people with diverse, often conflicting, perspectives concerning complex social issues, such as the environment, education, or social services, to build a new future. control of social services, education center.
- Organisations, private companies or public agencies, needing to develop a new strategy, direction, and actions people are committed to carrying out together. control of businesses
- Multiple organisations wanting to develop a plan for merging their business strategies or integrating their service delivery.
- Networks, organisations, or institutes that need to be built from scratch to deal with issues in the changing environment.

rebuild networks -
control news dissemination

We will all be examined to see if we are in a position to be a doctor. Kateri will get new doctors after chasing out previous

The following are only a few examples of the power of the Search Conference method. They illustrate the scope of the Search Conference from regional planning to planning on important social and environmental issues, and to strategic planning for any organisation.

In Nebraska mental health professionals, consumers, and political leaders develop integrated plan for their state's mental health delivery system that they are implementing themselves. The new system is consumer based, locally driven, and supported by a new state mental health institute. These results came from a series of three Search Conferences on the future of mental health.

At Hewlett-Packard, one manufacturing plant used the Search Conference method to renew its business by bringing together leaders from the organisation to collaborate on a thorough strategic plan, including decisions about key business strategies. Another HP plant did a Search Conference to develop a plan for empowering its workforce. This Search Conference led to several new strategies including implementation of self managing groups.

In the Macatawa region of Michigan, citizens and community leaders used a Search Conference to develop a comprehensive plan for the future of their region. The plan included specific, concrete strategies on transportation, education, and economic development. After the Search Conference, the participants are continuing to work on implementation of the plan. The regional council adopted the plan as its official strategic plan and based its organisational structure on the strategies.

In Colorado, the governor called together water engineers from the front range communities of the Rocky Mountains to cooperate on the use of scarce water resources in this semi-mid region. The history of deep conflict and litigation over water resources goes back more than one hundred years in the state. The engineers came up with a plan that would for the first time ever make it possible for their communities to share water resources. At the conference they organised themselves into temporary network organisation to implement the plan.

What Happens in a Search Conference?

Search Conferences are increasingly popular because they hold out the promise of commitment to and collective action towards agreed goals, directions, and change. Merrelyn Emery

20-50 people from the system (leaders of the organisation or people from the community) participate based on their knowledge of the system, diverse perspectives, and potential for implementing the plan they develop. Participants attend not as representatives of stakeholder groups, but because of their importance to the conference task. The idea is to get the right people in the room, those whose presence is critical for doing the job right. Once in the room, people become a community of planners.

When we use the word participative in the Search Conference, we are going beyond the way people often use the word. The Search Conference is not about a group giving input to higher up authorities or others who are responsible for planning. Participation, here, means the group actually develops and carries out the plan. That's why it is important to keep the number of participants at a level where real community can emerge.

The Search Conference is not the usual visioning process that has been so trendy over the years. We constantly encounter organisations and communities that have produced creative, abstract vision statements that are framed on the wall and go nowhere. The Search Conference,

on the other hand, rivets people's attention on real action based on a future the group decides to make happen.

The conference is normally two days and two nights, preferably off-site. People immerse themselves in a social island setting in which they form new relationships and commitments. At the conference people work together mostly as a large conference community, with some small groups for specific tasks. We call it searching because the conference community searches through their external environment and system, collecting, analysing and synthesising data. In this process, people simultaneously learn and plan together.

The Search Conference is designed to provide a learning environment in which participation is equal and open regardless of hierarchy or position. People's words are spoken out loud and recorded on chart paper for all to see. There are no individual workbooks or private note taking as the emphasis is on restoring oral culture and discussion.

The Search Conference has no presenters, lectures, speeches, keynote addresses, games, or training sessions. There is nothing to make it look as if people are in a training workshop or traditional conference. People do not have to perform skits or do guided fantasy visions. And there is no need for people to feel

*drumming psychosis - hypnosis, social programming
used in prisons - to be used in our schools*

confused or experience chaos in order for learning or change to occur. There is nothing magical about a Search Conference; it's just people doing real work on important tasks. *not defined!*

People are collectively responsible for tasks and outcomes. Conference managers make sure participants have the best structure and process for their task, providing the best possible learning environment.

The Search Conference is about jigsaw puzzle solving. *The focus is on putting the right pieces of strategy together that will produce the desirable future.* Puzzle learning is unlike problem solving in that, until each piece is individually located and placed, it is not possible to determine which piece must be found next. In a Search Conference, each person contributes knowledge and expertise about some piece of the overall puzzle.

Search Conference Design: The Open Systems Funnel

*desirable corporate future. Everybody has
same facts
repetitive*

all under handlers' guidance
People are purposeful and can, in the appropriate conditions, be ideal seeking. Merrelyn Emery
The Search Conference resembles a funnel in its design. It begins with the widest possible perspective, outside ourselves and our task, to explore possibilities. Then it narrows to specific key strategies and actions, *widening again as the group diffuses and implements its plan back home.* The design is essentially the translation of the concept of open systems into a conference learning environment, to make open systems come alive.

corporate
In a nutshell, the Search Conference begins with the group learning about its turbulent, uncertain global environment. Next, the group searches through its system's past and present in order to develop the most desirable system. Then they develop strategies and action plans that they will implement.

Roughly one third of the conference time focuses on learning about the turbulent environment. one third on learning about the system and the last third concentrates on action planning. *all in secret*

Every Search Conference is unique, requiring special planning and design. There are no set activities to take off the shelf and dust off for simple use. This is the generic process:

1. Changes in the World Important Into the Future Desirable and Probable Future of the World *new World Order*
2. Our System's History: Where We Came From
3. Our Current System: What to Keep, Drop, and Create *we will all follow the Handsome Lake religion*
4. Our Most Desirable System
5. Strategies and Actions Plans
6. Community Grows and Diffuses Through Implementation - *pacification of the Community*

The Process in Detail

Learning about Our Turbulent Environment *Double speak like "1984" Orwell.*

People want to learn, and want to create and exercise control over their futures Merrelyn Emery

After a brief opening session to clarify the conference task and agenda, and a session to negotiate expectations for the conference, the search is underway. There are no ice breakers, speeches, lectures or any activities that might suggest that people are about to experience a traditional conference in which someone else is responsible for doing the work.

Changes in the world...Desirable and Probable Futures. The first session has people working as a large community. People voice their perceptions of what has been happening in the world in the past 5-7 years that has struck them as significant. The ground rule is that all perceptions of the environment are valid and are written on chart paper for all to see. The changing world appears before everyone's eyes as the list grows: movement toward a global economy, intensifying environmental problems, expanding global communication and technology, increasing government regulation, increasing empowerment in the workplace. The list goes on and on.

This is an important and exciting session because all the conceptual frameworks of the search conference immediately come into play. People see that their organisation or community exists within a much larger context. People are immediately taking responsibility for their own data, behaving in an open and public manner, beginning to build a planning community of trust. Doing this session as a total community sends the message that the Search Conference is a community building event.

*Community pacification
system.*

It's a System.

each headed by a handler.

Next, small task groups form to analyse the data. They come to grips with the significance of the changes they have perceived by identifying both the probable and desirable future of the world several years in the future. They discuss what the world will probably look like if global trends continue developing as they are. They also envision their desirable future for the world if we get things right. The groups report their findings and integrate the results into a final community list.

always called a "system" plus environment

In identifying their desirable future of the world, the conference community is expressing and coming to agreement on their shared human ideals. These ideals will serve as a benchmark for later work on determining the system's most desirable future. Common ideals that tend to emerge in a Search Conference include such desirable futures as: peaceful resolution of differences; increased community participation; respect for human rights; balance between development and environment; community and regional cooperation. Agreement on basic human ideals makes it easier, later in the conference, to agree on specific, concrete strategies that are embedded in these ideals.

to find out strengths of community to people - form agenda to break it down. adapt to corporate nws

The point of starting with the environment is that there is a direct connection between the future direction of any organisation or community and the direction of the larger global environment. This is called directive correlation. The theory suggests that any new state of affairs is jointly determined by both the system and the environment. Many organisations mistakenly believe they need only be aware of their immediate business environment in the planning process. They thereby risk failure to be adaptive in a fast changing world. When system and environment are moving in sync, they have an adaptive relationship.

★

In corporate and issue oriented searches, another level of environment may need to be included. This is the task environment, those changes just outside the boundary of the system that are having the most immediate effect on the future of the system. Examples from corporate searches include marketing, industry trends, technical innovations, or changes in the larger corporate environment.

what are the people's weaknesses.

Learning about Our System

nothing about true history, only fake history -

The next phase has people appreciating their history as a system, analysing the current functioning of the system, and then agreeing on their systems most desirable future.

Our System's History: Where We Came From. Surveying the significant historic events and changes is a critical phase for any already existing system, whether organisation, community, industry, or network. Gaining a shared appreciation of where they have come from, what has made the system what it is today, is an important part of the context.

extolling corporate system.

Without this perspective, the group is at risk of designing a future that fails to link past and future.

It is best to do the history session as a large open community discussion, with people telling their own perspective on events they believe shaped their organisation or community. It is good for people to just talk in open large group without any artificial expectations, like identifying decades or time lines. Everyone learns about the continuities that have shaped the system. In a way, the history session restores the kind of oral culture that allows people to celebrate and take pleasure in their common organisational past. The history session becomes a fully participative community building event amplifying the common ground established during the previous phase.

listen, then go on to next phase.

Our Current System: What to Keep, Drop, and Create. With both future and past contexts in place, the group enters another analytical phase. Here it builds upon the learning from the history session and should by now have sufficient trust in itself to openly acknowledge the weaknesses as well as strengths of the current state of the system. Rather than narrow this session down to a typical strengths and weaknesses analysis, it is more useful to broaden the analysis. This allows people to continue their learning from the history session. The task is to identify, usually in large group, what about the current functioning of the system to keep, drop, and create. This is a brainstorm with the ground rule that all perceptions are valid. This reinforces confidence in people's direct perceptions and values, and in their openness and democratic functioning.

This process, building on the history session, is just another preparatory step in the mutually supporting processes of building a planning community. At this stage we start using the word community to describe the search conference group.

Most Desirable System. People break into small groups that work in parallel on the same task: the most desirable future of the system. There are no imposed ways for the groups to work. The creativity is in the ideas of the groups. The groups manage themselves to come up with lists of concrete points describing the desirable system, as it would look at an agreed upon time in the future. The groups report and integrate their results. Then the entire conference community decides which points to develop into desirable strategic goals.

*removal of
kaiahere: kawa elders from houghouse
replaced by band council nominees*

The process is designed to avoid the lofty vision statements that have led to so much frustration and misunderstanding in organisations. Too often groups create lofty visions that they frame on the wall, but never convert into concrete strategy. The belief that somehow a powerful vision will magically happen has led to deeper levels of cynicism. Our experience is that making our desirable futures happen requires strategy and concrete action planning.

It is important that this session result in an array of desirable future strategies, so as not to put all the emphasis on one overarching theme. It is best not to put all the planning eggs in one basket. The number of strategies selected is up to the group to decide based on what they think they can handle.

Action Planning

What we need now are heroes and heroines, about a million of them; one brave deed is worth a thousand words. Sentiment without action is the ruin of the soul. Edward Abbey

The final third of the Search Conference involves the community in developing their desirable future into specific strategies and action plans. These plans contain a clear agreement on steps for implementing the plan and spreading their learning back home. *thru media controlled by the system "corporate"*

The time allotted for this phase should be roughly one third of the total working time of the Search Conference. People agree on a final reporting time. Within that period, groups can choose their own working and resting timetable. They are self managing.

Strategies and Actions. There are several variations, but normally there is enough trust in the community for participants to become self managing. In practice this means that participants self select around strategic goals they want to work on, forming task forces that will develop action plans for that goal on behalf of the whole community.

The components of this session are:

- Constraints and dealing with them; *coercion, force*
- Our desirable and achievable future, does work on constraints indicate any change in strategy?
- What are we going to do to make it happen?
- Next steps, follow up.

There is a short informational briefing on the strategy of the indirect approach. This concept suggests that the most effective strategies are those that are indirect. By indirect we mean that they encircle, get around, or undercut key constraints that exist, as opposed to directly confronting barriers that may be difficult to overcome.

The intent here is to put constraints in a positive frame of reference, as items to work around. Because constraints are considered positive, task force groups often find that their work here provides major leads if not strategies for their chosen strategic goal. It is rare for a Search Conference to adjust their desirable future after putting constraints under the creative gaze. Wherever possible, there is an interim plenary to ensure coordination of task force's plans in the interest of the total community.

The most successful strategies and action plans are those which are nested in time. If the ultimate time frame used for creating the most desirable system is 2005 for example, action plans may include subgoals for 1998 and 2000. Similarly, the plan will also include mechanisms for monitoring and coordinating progress, specifying who is responsible and when. *strategies planned 5 years before*

Final task force reports lead into a large group session where the community plans its continued life. This is the follow up session and it is here that the community decides what to do with its immediate product, usually some sort of report, setting out who should do it by when. Usually the community selects some of their members to do this; report writing is not the job of consultants. The community will also decide when to meet again and in what structural configuration.

The Process of Implementation

The Search Conference is the middle part of an overall three-part process of pre-planning, search conference, and implementation. No two processes of implementation are the same, but how the community structures itself for implementation can make or break it. It is important that this new community of planners not fall back into a bureaucratic work structure. It should be careful not to organise itself into a traditional bureaucratic committee structure. A committee is typically run by a chair person, with membership and rules decided beforehand by those higher up in the organisation. Responsibility for carrying out the plan rests

with the entire group. not just higher ups, or sub-committees. A committee is only a mini-bureaucracy with the usual territorial bickering, leading to a rapid decline in attendance at meetings, enthusiasm and energy, and a waste of the gains made in the conference. Some Search Conferences overcome this by making sure there is commitment to maintain the self managing structure experienced in the Search Conference. Some conferences add time at the end for a Participative Design Workshop to organise the group into a democratic, self managing work organisation.

Principles at Work in Every Search Conference

Good cooks don't follow recipes, they use principles. Julia Child

The Search Conference is simple, straightforward, and conceptually deep. It is based on concepts that cross over many disciplines, including ecology, psychology, and all the social sciences. It has benefited from over 30 years of research on the principles and theories needed for direct democratic learning and planning to occur. These principles are the heart of the search conference. Understanding them and how they operate in the Search Conference is critical to successful use. These principles also help differentiate the Search Conference from other participative approaches.

Democratic Learning for Living Democratically

Democracy cannot be imposed upon a person; it has to be learned by a process of voluntary and responsible participation. Kurt Lewin

We use the word democratic when describing Search Conferences. In this context, we are not just talking about democratic philosophy or values. And we are not suggesting that organisations make decisions by voting or use representative means to run their business. Being democratic means that people who do the work, to the extent possible, have responsibility for the control and coordination of that work, whether it be making a product or developing a plan. For people to behave democratically they need a learning and working structure that is designed to get it. The two basic components of democratic learning are the democratic design principle and ecological learning.

The Democratic Design Principle. As a result of his action research projects with Eric Trist in the coal mines of Great Britain after World War II, Fred Emery perceived two basic principles for designing any organisation. The first principle he called bureaucratic, meaning that responsibility for control and coordination of work is located one level above where the work occurs. This is an organisation that by its structure de-skills and devalues people. The second principle he called democratic. An organisation designed according to the democratic design principle locates responsibility for control and coordination with the people doing the work, to the extent possible.

These design principles are always a matter of choice. In work organisations (like the British coal mines), the democratic design principle leads to the structure of self managing groups. People in self managing groups have enough elbow room for decision making ability to set their

own goals and get feedback, experience work that has plenty of variety and visibility of a whole product. The democratic work environment is a place where people have control over their own work conditions and have a desirable future worth living and working for. *So They are Told.*

The Search Conference is a temporary work organisation, and as such is designed along the lines of the democratic design principle, and is self managing. In the context of the search, this means participants are responsible for learning about the system and environment, doing the planning work, and carrying out their own plan. *under their trained assets*

Bureaucratic conferences are talking head designs where responsibility for content and outcomes rests with the organisers, speakers, facilitators, or chairs, not with the audience. Little learning results in a bureaucratic structure. Unlike bureaucratic organisations, the Search Conference has a democratic structure with no hierarchical dominance of one person over another, no master-servant relationships. This does not mean that anything goes in a Search Conference. It is not a laissez-faire event where it's every person for himself. Doing whatever you want is not democratic. Laissez-faire type conferences risk producing cynicism and frustration by not providing a clear purpose and structure for creative work.

The democratic design principle produces a fully working learning conference that takes responsibility for its own outcomes and implementation. In practical terms, this means that the people who participate in the Search Conference should be members of the system, not outsiders, because they will implement the new plan themselves. It also means that participants do the work in the conference, including follow up, while conference managers are responsible for their own work of providing the best learning environment possible. *selected by the system*

a lie. We are born with our knowledge. This system is trying to subsume it with corporate thinking

Ecological Learning. The Search Conference is based on research that shows that humans have evolved to extract information directly from their social environment. The environment has an informational structure. It's loaded with invariances and patterns, in other words, real meaning. Since the environment contains limitless information, any person with an intact perceptual system can make sense from it. This innate ability to directly perceive meaning from the environment is sometimes called common sense. Access to information is restricted only by habit, lack of confidence, and physical or psychological isolation from the informational field. Bureaucratic learning structures, like traditional conferences, have prevented people from exercising their abilities to the point that direct learning is like a muscle that has atrophied. The Search Conference is an environment in which people flex their learning and planning muscles. *George Orwellian, plain!*

Humanity, by nature, is an intimate and indivisible part of its world. We were never tabula rasa, bottles to be filled up, tablets to be written on. People, as perceiving systems, are purposeful and have the potential to act upon and define their environment. The combination of this capacity in the environment to offer opportunity for direct understanding combined with the purposeful potential of every human, expresses the process of living in a meaningful world. *we are trained to rely on a few in the system.*

Our formal educational systems are based on the theory that abstract knowledge is superior to the knowledge we derive from first hand experience. The traditional approach demands that we be sent to school to get the right answers that are found in the warehouses of abstract knowledge accumulated from the past. Searching is a process in which people use their natural abilities to make sense of their surroundings. It is learning by doing. Exercising this ability has the effect of engendering self-confidence. As this confidence grows, people grow and become even more perceptive, and able to think. The environment itself changes as a result. *defined by the system. to be provided by the 'system'*

Planning for Turbulent Times

what of innate knowledge? not repetition of their facts.

Instead of constantly adapting to change, why not change to be adaptive? Malcolm Emery

Today's global environment is turbulent. changing faster than our institutions. It was not always that way. Up until the advent of the industrial revolution in the late 18th century, the social environment of most societies was relatively stable and predictable. Most of our human past was spent in this type environment. Hunting and gathering, small village life, and agriculture were the norms. In this environment, organisations and cultures were designed for non dominant relationships. This applied also to the relation between people and their physical world, a genuinely sustainable way of living that fulfilled basic human needs. Values were stable and predictable. Now we call it the good old days. Search Conferences were not necessary then because continuous community talk was a way of life. *natural resources of the outside world*

The industrial revolution changed the texture of our environment. The environment basically remained stable and predictable, but competition between systems over natural resources fuelled technical innovations, large scale hierarchical organisations, and less cooperation. Simple linear projection, expert driven, mechanistic problem solving and win-lose approaches were the dominant planning methods. It was during this period from about 1790 to post W.W.II that bureaucratic organisations were in full bloom, treating workers as replaceable parts, cogs in the machine of industry.

The term turbulent describes the texture of today's environment, an environment that has been emerging for over thirty years. Turbulence refers to the way the current social environment is producing change by its own dynamism and consequently creating uncertainty for any system within it. The environment is no longer predictable or stable. When people see the list of inter-connected changes in the world go up on chart paper at the beginning of the Search Conference, they appreciate the way all these changes affect one another and produce uncertainty for their own organisation or community.

In a Search Conference people experience a learning environment in which they systematically explore their entire environment. The purpose is to find ways to actively plan so that they are both responding to and changing their environment as they go. It's called active adaptation and it is what searching is all about. Adapting does not just mean getting faster or being more flexible. It means becoming actively adaptive-developing a system's capacity to be a community that continuously learns from and changes its environment. A system can reduce turbulence by changing the conditions that surround it and by influencing its future direction. The way to do this in a turbulent environment, is through the sharing of human ideals. To become adaptive, a system needs to make sure there is alignment between its own desirable future and the desirable future it has for the world.

The learning environment of the Search Conference allows people to seek human ideals together and use these to develop a future worth living for. It's not just about value clarification where people get clear on what they think is important and what guides their behaviour. It's more than that. It's all about creating the highest human capacity through community.

Search Conference planning differs from the type of short term planning required for your next weekend cookout. For the cookout you need only to consider a handful of variables within a short time period-whom to invite and what to cook? You would not expect major changes in the food preferences of your friends within a week, although today such shifts cannot be ruled out. Search Conference planning is concerned with long time frames. In a turbulent, uncertain global environment, the simple cookout approach to planning will not work. There are too many variables outside the control of the system. Building plans for our future that are based on our shared human ideals is the way to plan effectively in uncertain times. Being clear about the ends we want to arrive at five to ten years from now allows us to be adaptive in choosing the means to get us there.

The Search Conference is about strategy. It is all about making our desirable future happen, not just being visionary. Dreams do not come true without hard work. The Search Conference adopts the strategy of the indirect approach as developed in the Art of War by Sun Tzu and exemplified in the ancient Chinese game GO, as it is called in the West. It means the art and science of manoeuvring. The strategy of the indirect approach, in contrast to the direct approach that looks to win battles in the short term, takes a much longer time horizon. Its goal is to maximise territory while minimising the use of resources. The message is: Do not waste costly resources fighting battles, prevent war. Manoeuvring through implementation, another puzzle approach, is the approach for a world of uncertainty. In the Search Conference, people check the reality of their new strategies by identifying ways around key constraints. The indirect approach results in an array of practical strategies and actions that are most likely to stand the test of time and uncertainty.

Effective Communication for Building Community

There is a real world, and it is knowable to the ordinary person. Fred Emery

The Search Conference is designed to produce effective communications. Successful communication depends on four basic properties that were discovered and researched by Solomon Asch. These properties are called the conditions for effective communication. They come to life in the conference. The basic idea here is that face to face learning happens when people enter into a relationship in which they want to influence each other regarding some real task they care about. If the following conditions are met, group learning and planning can occur. *Avoid clans?*

Openness. In order for people to communicate effectively, they have to know they are in a situation that is totally open to their investigation and that things are what they appear to be. The Search Conference is a learning environment where exploration and checking out are valued and where it is assumed that differences in perception and opinion exist. It is healthy and creative to acknowledge such differences. Mutual learning follows from the sharing of different experiences and perceptions.

A climate of openness in a Search Conference begins with the briefing of participants before the conference and a straightforward statement and display of the conference agenda, purpose, and expectations. Perhaps the most striking innovation towards openness, which is now taken for granted, is the use of chart paper to compile an immediate, accessible and continuing record of work as it occurs. These publicly displayed papers provide the ultimate guarantee of openness and absence of manipulation.

that we are greedy like the white people? No!
We are all humans with the same human concerns. Most people naturally seek confirmation of their basic human similarities. Once people see that the behaviours and motives of others are similar to their own, it becomes possible for them to admit they can learn from each other. Any perception that a participant or conference manager is acting as expert or talking down will reduce the effectiveness of mutual learning.

Early on in the Search Conference, people discover their similarities through sharing of ideals about their desirable future of the world. Publicly shared ideals makes them visible and real. It confirms that there is an underlying level of concern with humanity and the state of the world. Human ideals transcend gender, race, status, or age. By discussing and deciding our desirable future in either global terms, we establish a climate of working together.

We all live in the same world. The first task of the Search Conference is for people to state out loud data they know concerning changes in the world over the last 5-7 years. The rule is that all perceptions are valid. This data is publicly listed on chart paper. Accessible to all and manipulated by none, this snapshot of the changing world establishes the validity of the notion that we all live in the same world. This process establishes that the environment has real features, commonly perceived, and forms a shared context for planning and action.

Trust. When people experience an open learning environment, appreciate that we are all humans with the same human concerns, and we all live in the same real world, then trust develops. As trust accumulates in the Search Conference, so do interpersonal relations strengthen and deepen, increasing the probability of

this brain washing pacification corporate agenda is not based on trust!

mutual learning and network building.

The process of implementation would not be possible without this spiral of trust, learning, energy, and commitment. The presence of trust is tested towards the end of the Search Conference when participants self select into task forces to work on action plans. Each self selected subgroup is working on behalf of the whole community and must be trusted to do so.

The real key to direct action is open communication and discussion among people. The Search Conference restores the human process of speaking and hearing, the oral culture known to older (or ancient) peoples. The world of literacy and bureaucracy is silent.

Finding Our Common Ground

Democracy is harmony through conflict. Wynton Marsalis

rule by majority
The Search Conference takes us beyond unanimity and consensus decision making to an environment in which people make their differences clear and base their future strategies on the common ground upon which they can agree. Conflict is an important feature of the Search Conference. It is not avoided. In the Search Conference people take conflict seriously. They work to truly understand and clarify their real differences. This is important because while these differences may not be part of the strategy the group adopts, they continue to exist within the community during implementation. Experience shows that when conflicts become clear and respected by the group, they diminish over time.

At various points in the Search Conference, the community must make important decisions. The crucial decision points are agreement on the desirable and probable future of the world, agreement on the most desirable system, and action plans. Finding common ground works as follows. After small group work on the desirable future of the world, for instance, is reported and integrated with other group reports, two questions are raised. First, questions of clarification of the report and then a question as to whether anyone cannot live with or is not prepared to work towards any item on any of the reports.

convince
If there is such a response, it is first debated fully in large group. If there is substantial disagreement, a couple of people from different sides may be sent out to negotiate the point, while the rest get on with the task of integration and agreement. If negotiation fails, the item goes on a disagreed list. It ceases to be part of the further work of the community.

unrealistic?
In this process we are not assuming there will or should be consensus within the community. To do so is unrealistic, particularly on topics where there are legitimate and institutionalised adversarial positions. The aim is to precisely establish common ground and to know exactly where the thin line between agreement and disagreement is located. groups with a history of conflict tend to assume a greater area of conflict and less common ground than actually exists. Once the common ground and its boundaries are clarified, the community can continue work towards its goals on the basis of the common ground regardless of size.

Using the disagreed list as a way of clarifying and respecting a conflict is important at the beginning of a search conference. It shows people that a simple, controlled mechanism is available for dealing with disagreements. People realise they can use this process later in the conference for more intense conflicts that are closer to home. *Get them out of the room.*

In today's trendy world there is concern about verbal aggression. It should not be surprising that when people are planning around their most deeply held concerns, they may become excited, indeed angry over differences. If they were not, there should be concern that either the wrong people were in the room or that dissociation had reached a point that all such participative planning was useless.

Planning a Search Conference

90% of life is showing up! Woody Allen

Search Conference Managers

Ideally, Search Conference managers are involved from the start. Search Conference design and management require knowledge of search principles, ability to creatively match these principles to the search task, and the skill to design on the run once the conference is underway. Search Conference managers normally are experienced consultants trained in the Search Conference method. Managers come from outside the system and are responsible for conference design and management. It is preferable that conference managers are not experts and do not have a vested interest in the subject matter. However, they do need to immerse themselves in the circumstances of the system so they understand what people are talking about. The job of conference managers is strictly limited to providing a democratic structure for

subjects need to become strong consumer oriented.

corporate thinking & control

the group, and not becoming involved in the content.

Preparation and Planning

In most cases, several people from the system act as a planning group to organise the conference. Their job, working with conference managers, is to clearly identify the system that is the subject of the Search Conference. This is a critical step because it determines the task of the conference and guides the selection of participants. Once the system is clear, the planning group goes on to identify the conference task and manage the selection process.

Often the identification of the system is straightforward. For example, at Hewlett-Packard, the boundary of the system was the entire manufacturing plant that needed a new strategic plan. In the Macatawa search, the system was a geographic region of the state of Michigan, including several townships and communities.

Sometimes the system boundary is more complicated and difficult to determine. In the Nebraska mental health search, there was a desire to define the system to include a strong consumer orientation. Identifying the system as consumer based mental health led to the inclusion of consumers as participants. In the Colorado Front Range Water Search Conference the system was limited to water engineering among eastern Colorado communities. The system definition led to a decision to involve water experts only and keep the conference focused on future water resource usage in the region. In another Hewlett-Packard search, the system was identified as workplace empowerment in a specific manufacturing plant. Plant-wide strategic planning was not part of the process.

Once the system is identified, the conference task follows a simple formula: A plan for the most desirable future of X that participants will carry out together. Applying this formula to one of the examples, the purpose of the Macatawa Search Conference was to develop a plan for the most desirable future of the Macatawa Region that participants will carry out together.

The most important element in planning a Search Conference is the selection of participants. They are chosen because they have important knowledge about the system and can implement the plan that comes out of the conference. Because the Search Conference is about puzzle solving participants are selected because they carry pieces of the puzzle in their heads. If a major piece is missing the puzzle solution may be inadequate or the implementation difficult. People from a system know who in the community has the knowledge (puzzle pieces) necessary to put together the whole puzzle. *corporate puzzle!*

There is a difference in how to choose participants for a community search and an organisation search. For community searches, it is best to use the community reference system as the basis of selection. The great advantage others approach for geographical community, industry, and issue searches is that the community broadly defined determines the participants.

The community reference system works in the following way:

selecting community assets -

1. Draw a rough social map of the system, whether it be community, issue, or industry, covering such aspects as interest groups and demographics;
2. Decide the criteria against which people are to be selected, such as areas of expertise and knowledge of the system, and potential for implementation;
3. Pick a starting point person in each sector of the map and ask them for two or three names that fit the criteria. This is for help only, no guarantees of invitation are given;
4. Ask each of the new names to give two or three names that fit the criteria;
5. After one or two go arounds, some of the same names should appear. Select these from the total list and add others to make sure the map is covered;
6. It is not considered relevant that they be educated, literate or articulate.

This community reference system clarifies that Search Conference participants are not there as representatives as they would be on a representative committee. They do not see themselves as stakeholders who are there to argue for and get the best deal for their constituents. Participants are briefed that they attend and participate just as themselves. In this, they are there as representatives of the human race and its basic ideals.

band council

For organisation searches such as corporations, the membership consists of those who hold responsibility for the health and direction of the organisation. It is not appropriate for outsiders to attend, as they come from the environment not the system. Participation is determined by the boundary of the system; people with puzzle knowledge inside the boundary of the system.

The system itself in preparing for a Search Conference, may realise they require more research data about a particular area before the conference. For example, a community may want to provide some demographic information to participants before the conference. Or an organisation could survey their customers concerning their needs and expectations. The timing of a Search Conference should not be decided until sufficient preparation has been done to ensure confidence in the outcome.

All participants should be fully briefed about all aspects of the Search Conference beforehand. This works best in face to face conversation that can lead to design improvements as well as greater understanding of and commitment to the task. When participants show up for the Search Conference, they should know what to expect and be ready to participate immediately. Once the conference is underway, the work of the planning group is complete.

Time, Place, and Numbers

how to target the victims, cum assets

Normally a Search Conference takes two nights and two days. Longer periods risk cognitive and emotional overload. Shorter conferences run the risk of not establishing the environment and system learning required to create a planning community prepared to implement its plan.

A Search Conference is not an everyday went and does not fit normal business hours. The best starting time is late afternoon. It is essential to create a relaxed social atmosphere in which people can become acquainted. Introductions, briefings, and expectations can occur before dinner, preferably served buffet style. Work proper starts after dinner and continues to about 10:00 p.m. It continues through the next day and evening finishing late afternoon on the third day. Flexible arrangements help. Continuous access to refreshments is better than fixed times, because breaks are hard to predict.

isolate the participants

People cannot be expected to work intensively and creatively in their normal office environments. They need to be free of distractions like phones and messages. The Search Conference is a social island. Facilities should be open to outside and fresh air, have plenty of wall space and be reasonably comfortable. However, Search Conferences have been held in sub optimal conditions and worked. The facility is far less important than design and management.

Search Conferences work best with 20-40 people. Less than 15-20 takes on the character and dynamics of a small group. There is not enough diversity of data and perspectives to produce the energy and creative thinking that characterise a large working group. The upper limit has been successfully pushed up to 50 or more, but requires more time and management skill to pull off. Other participative approaches are able to accommodate more people because they limit the notion of participation to input, or do not establish a community that carries out its own plan.

For larger numbers, a multi-search is required. A multi-search consists of two or more Search Conference running in parallel. Multi-searches are risky because of the difficulty of design and coordination. On the other hand, Larger numbers may gain a large multiplier effect in terms of diffusion. The multi-search can be avoided by more careful selection of participants. It should be possible to select participants who wear many hats. It may be preferable to design a series of Search Conference that can be integrated later in various ways. There are many variations on the theme; all are questions of design.

After the Search

The Search Conference is now a well established and highly reliable method of participative planning. It has the power to produce learning planning communities committed to making their own future happen. Not only do people walk away committed to their plan, they also have learned how to search so they can continue to adaptively change.

While the Search Conference produces adaptive relations between system and environment, it requires nurturing in the long run. The key to continued success is what happens after the search, and why. The most frequent answer for why is that the search group developed a democratic structure for implementation. Successful search groups stay away from the bureaucratic committee structure. They implement by making sure the group maintains responsibility for the control and coordination of the plan. People move to a new level of shared responsibility for their own affairs. The Search Conference provides an experience of and learning about direct participative democracy.

a small group secretly running a movement is not democracy

Communities and organisations that have searched and implemented their plan through a democratic structure become systems that continue to adapt and learn. The democratic design principle and ecological learning become as natural as walking and talking. Members of such an organisation or community develop a keen awareness of their turbulent social environment in the same way a farmer keeps an eye on the changing weather conditions. Many groups set aside a day or so at regular intervals for formal long term

planning. As time passes, searching becomes much less formal; it becomes a way of life. People naturally respect others' perceptions. Management is everybody's business.

Rules give way to purposeful conversation. The product of planning through a Search Conference, therefore, is not just the plan but the continuing learning planning community.

Robert Rehm and Nancy Cebula are leaders in the application of the Search Conference and Participative Design methods. They have done this work with communities, corporations, government, educational institutions, and regional groups struggling with contentious issues such as environmental or social problems. They train and coach practitioners in the theory and use of these methods. The common thread of their work is moving systems towards democratic structures and values to improve system effectiveness.

Merrelyn Emery has a long history of involvement in democratisation to produce organisations for continuous learning. Her continuing professional interest is in the development of the Participative Design Workshop for organisational design and the Search Conference as a reliable method of participative strategic planning. Her recent efforts have focused on training programs for Participative Design and Search Conference practitioners. She can be contacted at the Australian National University, Canberra, Australia.

The article Participative Design by Robert Rehm is also available. It describes the Participative Design method developed by Fred and Merrelyn Emery that enables people to redesign their workplace to be self managing.

Robert Rehm and Nancy Cebula, 1460 Judson Drive. Boulder, Colorado 80303, Telephone: (303) 499-1607, Fax: (303) 494-2337.

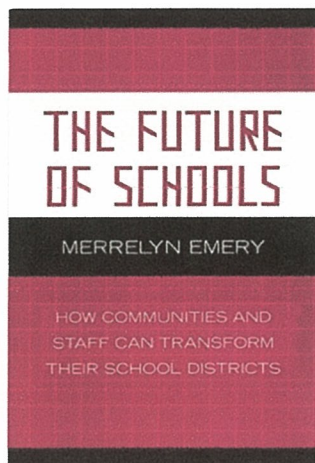
*Rehm: Her expertise is in breaking
down the natural system of
the okweh'mon:weh.*

We know who the 'assets' are in Kahnawake.

*Professional okweh'mon:weh from the
traditional community are kicked out.
all institutions - cultural centre,
education, hospital, economic
develop, social services, band council, Justice,
media, all under that umbrella.*

*The assets were / are trained at University
of Chicago (Jesuit) and the US National
Defence University direction.*

*We've been had! US Defence doing is this
to do it all over the world.
more to come....*



Ver las 3 imágenes

The Future of Schools: How Communities and Staff Can Transform Their School Districts (Leading Systemic School Improvement) (Inglés) Tapa blanda – 26

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Reseña del editor

The Future of Schools will help changemakers move toward better functioning school systems using reliable, participative, and practical methods. The author describes an orderly sequence of activities that are intertwined with simple explanations. The principles and methods on which the book is based, follow from over fifty years of research ensuring that the processes yield reliable results. Each

chapter discusses a range of variations and examples with both successful applications and potential pitfalls with simple ways of avoiding them. These variations and examples help the school district and its community to choose the best path through the planning and design processes for their unique people and circumstances. All of the methods and processes described are totally participative so that the schools and communities who use them can develop ownership of the processes and their outcomes. Not only does the school district change for the better, the community itself becomes more socially cohesive through working together for a common purpose.

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schools controlled by the military

Strategic Leadership and Decision Making

4

SYSTEMS THINKING AND LEARNING ORGANIZATIONS

The systems paradigm is a way of thinking about the strategic environment, and how to develop processes in organizations that achieve strategic goals. The systems paradigm should be viewed as a tool that leaders can use to design their organization's capability to: (1) analyze tactical and strategic environments; (2) develop and enact strategies in response to environmental demands; and, (3) sustain an adaptive and productive organizational culture. These three types of organizational processes are important in determining whether an organization can achieve strategic objectives in competitive environments.

A Leader's Strategic Analysis of the Environment

In 1997, Monsanto's CEO Robert Shapiro's analysis of Monsanto's strategic environment surfaced the future need for the company to create low cost, environmentally friendly products. He announced that Monsanto would begin its transformation from the chemicals company (ranked 4th in Fortune's 1996 domestic industry ranking and 18th in Fortune's global industry ranking) into a life sciences enterprise devoted to improving human health by seeking synergies in biotech, pharmaceutical research, and food products.

Developing and Enacting Strategies in Response To Environmental Demands

The Zoltek Company, in St. Louis, Missouri, manufactures carbon fiber, a versatile, light and strong material with wide uses ranging from golf club shafts to the tail section of the Boeing 777 jet liner. Its chairman, Zsolt Romy has the strategic goal of being the leader in the commercialization of low cost carbon fibers for non-aerospace applications. To achieve this objective, the firm is enacting its strategy in two ways. First it has developed manufacturing process to drive down production costs. Second, it has established a series of strategic partnerships with companies such as B.F. Goodrich, General Motors, and Owens Corning for strategic positioning and growth in the marketplace. *cheaper products, cut down labor.*

An Adaptive and Productive Organizational Culture

Harvard Professor Rosabeth Moss Kanter concluded from her study of large U.S. corporations that successful organizations have cultures that encourage multiple sensing mechanisms to the environment and enable quick reactions to changing environments by generating the best combinations of people for the job.

These examples illustrate one of the key principles in the systems paradigm: an organization's survival is based on sensing, analysis, and interaction with its environment. It is important to establish a set of definitions of terms that are highly relevant to the systems paradigm in strategic decision making.

Terms such as **strategic**, **decision making processes**, and **systems** are used in both every day conversation and in professional settings. Consequently, each of these terms are subject to misinterpretation when used within specific discussions in this chapter.

WHAT IS STRATEGIC?

*Research Conference Method
is studying us because we don't
fit in*

The term strategic has three components. The first refers to **the top level of the organization and the principal or principals who are ultimately responsible for the organization's actions and consequences of those actions.**

The second and third components add **temporal and risk dimensions** to the decisions these principals are responsible for. Strategic outcomes are long term in nature and may not materialize for at least 10 years. Moreover, strategic outcomes contribute directly to the survivability of the organization.

but not survival of the people?

DECISION MAKING PROCESSES

one person makes decision?

Decision making is associated with an individual, the leader; or, to small groups, such as a management team. Decision making also refers to the strategic decisions made by the principal or principals in an organization, as well as the collective information processes within organizations that precede, support, or follow those decisions. These processes include, but are not limited to: interpretation of issues, deliberations conceiving data and information, problem definition, development of decision options, and the selection of a course of action.

WHAT IS A SYSTEM?

Systems are composed of interrelated components such that the properties of both the system and its components are changed if the system is disassembled in any way (Ashmos and Huber 1987). There are different levels of systems, ranging from the simple mechanical systems with predetermined, motions of levers and pulleys (e.g., an automobile engine) to complex social organizations acting to accomplish objectives. The systems paradigm focuses on these processes that exist among system components, and between system components and the environment.

SYSTEMS THINKING

It is safe to say that all of you have been acquainted with the cybernetic or control systems of inputs, transformation processes, outputs, and feedback loops that maintain equilibrium. These system components operate within an environment as shown on the next page (figure). The cybernetic system has been used in a variety of disciplines as the general model of the systems paradigm. Cybernetic systems are **closed systems**, largely unaffected by the environment where they reside. By its definition, a cybernetic system is an inappropriate representation of the complex processes that occur in organizations, and particularly the strategic decision making processes in organizations.

ORGANIZATIONS ARE OPEN SYSTEMS

Today, organizations exist in competitive global environments where there is strong competition for resources, markets, skilled employees, and innovations. At the same time, many organizations confront environments that are unpredictable and complex. Organizational environments are multifaceted and can be categorized in the following way:

- **The Competition:** The competitive tactics between firms in an industry or business.

- **Customers:** Includes direct sales or companies that acquire another firm's customers through outputs for resale.
- **The Technological Sector:** The development of new production techniques and methods, innovation in materials and products, and general trends in research and science relevant to the organization
- **The Regulatory Sector:** Federal and state legislation and regulations, city or community policies, and political developments at all levels of government
- **The Economic Sector:** Factors such as stock markets, rate of inflation, foreign trade balance, federal and state budgets, interest rates, unemployment and economic growth rate
- **The Sociocultural Sector:** The social values of the general population, the work ethic, and demographic trends. (Daft, Sormunen, and Parks 1988)

First, as **open systems**, organizations are highly engaged with their environments. Successful organizations develop characteristics and perform processes that allow them to adapt to constraints, threats, and opportunities. They import capability from the environment. This capability can be achieved by acquiring another organization through a joint venture; or by improving their human and physical capital; or by obtaining the information needed to transform that capability into desired outputs such as physical goods, services, or a focused set of monetary or operational actions. Next, organizations' transformation processes are cyclical in nature, that is to say they are a predictable, ordered set of processes that might be determined by a budget cycle, a sales cycle, or a growing season. These well-ordered processes create negative entropy, the resistance to disorganization. Negative entropy maintains the reliability of transformation processes in spite of changes in environmental conditions.

Open systems also have environmental scanning processes that might exist in the recruiting directorate, the market

research department, or the complaint department to provide information about the systems performance and to adjust processes within the system.

Another feature of open systems is that they operate under conditions of dynamic homeostasis, the process of preserving the character of the system through its growth. Open systems use internal processes of review to modify their environmental scanning, input, transformation, and output processes to adapt to the changing VUCA factors of the environment, while still staying focused on their core competency. These modifications culminate in the quantitative and qualitative growth of an organization's capability to respond to future contingencies.

The systems paradigm is a useful model of the capabilities of government agencies, particularly the Department of Defense. Defense bureaucracies process tremendous quantities of information about the external environment to produce threat analyses, implement processes that transform information about manpower and resources into combat capability, and adjust internal processes for synthesizing information to support all levels of decision making. But there's a potential problem. The Defense Department, to achieve stability, uses sets of standards, to accomplish programmable outcomes. The sets DOD has been using may not be suited to respond to potential environmental challenges.

Change rather than stability has engulfed us. There are endless calls for the reinvention of government, acquisition reform, and defense realignment, as well as cautions about the revolution in global military affairs and the growing threat of terrorism. These changes in the environment have strategic implications beyond the realm of a single decision maker or even a top management team. But the systems paradigm prompts and demands that future leaders analyze their organization's capability to respond to these VUCA issues. Here are some points to consider:

- Each issue will have a unique set of environmental factors that have an impact on the organizational system. Which parts of the organization are designed to detect and analyze those factors?
- In light of these issues, can greater efficiencies be derived for obtaining inputs such as funding, raw materials, and human capital?
- Will the challenges posed by the changing environment require radically different transformation processes to generate and sustain the desired level of deterrence and combat capability?

The ability to answer these questions depends on how you frame organizational capability. If you view an organization as a **structural design** (e.g., a battalion), an organizational chart (e.g., a directorate in the Pentagon), a personnel roster (e.g., the comptroller shop) or a surrogate of military or industrial output (e.g., the 82nd Airborne or Boeing Aerospace) then you won't obtain an understanding how processes are translated into capability. You need to adjust your thinking to a **systems perspective** to bring out these dynamics.

From a systems perspective, organizations are collections of human and physical capital that exchange and process information, transform physical objects, and make decisions for the purpose of achieving some set of objectives related to their external environment. From this frame of reference, leaders can find ways to enhance existing processes in the organization, and identify the need for additional processes of environmental analysis to maintain the organization's survivability.

THE SYSTEMS PARADIGM AND STRATEGIC DECISION MAKING

Today, strategic leaders of competitive organizations face the challenge of using their organization's open systems capabilities to respond to present and future environmental challenges. This is a daunting task for any group of strategic leaders, regardless of their intelligence or experience. Leaders at this level are often overwhelmed by the quantity, as well as the VUCA aspects of environmental change. These conditions often place decision makers in situations that are beyond their expertise. In these situations, if a decision has to be rendered, leaders typically rely on their own scanning, analysis, and interpretation of data, albeit fraught with personal biases. Some leaders are effective using this technique but most strategic issues demand more rigorous approaches towards their resolution.

For the purposes of strategic decision making, organizations can be considered **interpretation systems** (Daft and Weick, 1984). **Organizational interpretation** is defined as "the process of translating events and developing shared understanding and conceptual schemes among members of upper management." Organizational interpretation about strategic issues is more than bureaucratic "staffing". In general, members of organizations support strategic leaders' interpretations by: creating and maintaining the organization's capability to gather information about environmental threats and opportunities; and efficiently

analyzing, evaluating and internally synthesizing this information to support the strategic decision making process. Organizational interpretation processes are valuable to strategic decision makers on two counts. First, they reduce the ambiguity of strategic issues by analyzing data from the environment. Next, these processes reduce the uncertainty associated with strategic issues. (For example, decentralized scanning performed by field organizations, lower level divisions, and individual specialists creates more insights to strategic issues in less time.) The ultimate benefit to strategic decision makers is that they can respond to strategic issues more quickly, with higher quality decisions.

If leaders permit their organizations to treat each confrontation with environmental change as a unique experience then, despite performance outcomes, these leaders are not deriving the full capability of organizational interpretation. When organizations develop the capability for **systematic learning** then successful and unsuccessful experiences will influence their future scanning and interpretation processes favorably.

ORGANIZATIONS AS LEARNING SYSTEMS *to produce change in us.*

Learning, whether associated with people or organizations, is a set of processes that produce change. Edwin Nevis, Anthony DiBella, and Janet Gould from the MIT Organizational Learning Center define organizational learning as "the capacity or processes within an organization to maintain or improve performance based on experience." The purpose of this section is to identify ways leaders can influence these processes to promote learning and improve strategic leadership and decision making.

Earlier in this chapter we described the features of organizations as open systems. Two features among them were relevant to organizational learning:

- The capability of organizations to internally review the effectiveness of systems' processes against the dynamics of the environment and within the parameters of its core competencies. *for us it's the outside corporate*
- Cumulative process modification that results in the quantitative and qualitative growth of an organization's capability to respond to future environmental contingencies. *system*

The first feature highlights the importance of organizational members dedicated to **continuous process improvement**. The phrase "process improvement" is overused, but it means that people should be constantly analyzing how they think, communicate, perform and add value to their organization. The first feature also implies that members need to have an intimate knowledge of the organization's core competencies, how their work contributes to the core competencies, and the environmental factors that are related to those core competencies.

Handlers
Employees' level of understanding about the organization's core competencies is initiated and reinforced by leadership messages. When leaders communicate how the organization's core competencies are linked to the activities of different organizational subunits, then employees will understand how their daily efforts are translated into organizational capability. Moreover, when leaders communicate the organization's vision, and the values and ideology that support the organizational culture, they enhance employees' understanding of the organization's strategic objectives.

Organizational leaders must institutionalize the processes of knowledge acquisition. Knowledge acquisition includes activities such as customer surveys, research and development programs, demonstration projects, performance reviews, and the analysis of competitors' products. Informal sources for knowledge acquisition activities include trade publications, televised news and print media. The goal is for knowledge acquisition to be performed continuously as opposed to a singular response from a management inquiry. In an organizational learning system, knowledge acquisition is followed by **information distribution**. Organizational scholar George Huber from the University of Texas at Austin describes information distribution in the following way:

Information distribution is a determinant of both the occurrence and breadth of organizational learning . . . organizational components commonly develop "new" information by piecing together items of information that they can obtain from other organizational units. . . . When information is widely distributed in an organization so that more and more varied sources for it exist, retrieval efforts are more likely to succeed and individuals and units are more likely to learn.

The activity of information distribution has even greater significance when it is performed by employees who are also knowledgeable about the organization's core competencies. At its best, information distribution in learning organizations involves purposeful exchanges of information among divisions in the organization that reduces the efforts of any single division to scan the environment. For example, in learning organizations, the supply division would know what information would be important to the marketing division, the production division, and the accounts division, and would route it to those divisions. Division personnel would also know when to modify the information it distributed, and to whom they distributed it as changes occurred in the organization's environment and in the organization's strategy. Again, **organizational leaders can facilitate these communication processes.**

Leaders can also establish interdepartmental working groups that have the assigned purpose of sharing acquired information to solve problems or develop strategies related to core competencies. Ultimately organizational leaders can make investments in human capital via training and development programs to standardize and improve "information-distribution" skills. Leaders can also invest in physical capital. They can create company-wide information systems that increase the ease and rate of information sharing among subunits.

ORGANIZATIONAL MEMORY

The second feature of open systems in learning organizations is process modification. This feature depends on organizational memory processes. An organization's capability to learn, and ultimately improve its future responses to the environment relies on processes that:

- Record organizational experiences that are relevant to strategic objectives
- Retrieve organizational experiences
- Apply those experiences to strategic decision making activities.

However, the processes that create organizational memory are frequently problematic. Many organizations have poor organizational memories because of a reliance only on employees' memories to retain, retrieve, and apply organizational experiences. This form of organizational memory is vulnerable to turnover and downsizing. Furthermore, organizations can have inadequate memories of success and failure because leaders develop processes to address immediate issues, but fail to evaluate if these processes have future value.

Finally, poor organizational memories can result from the absence of organizational processes to: document and catalog organizational actions and outcomes; or, evaluate how past strategies can be applied to achieve new strategic objectives.

There are interventions that organizational leaders can make to improve organizational memory processes. For example, they have to determine how the current experiences of the organization are linked to the vision they have for the organization, the organization's core competencies, and strategic objectives. These actions help set up criteria for identifying which organizational experiences should be a part of organizational memory.

Next, leaders need to leverage their role as shapers of the organization's culture to inculcate employees' beliefs that organizational memory is a valuable tool, instrumental to goal achievement. When processes of creating memory become a part of the organizational culture they have a better chance for longevity in spite of employee turnover.

The erosion of organizational memory can also be minimized when leaders formalize processes for creating and using organizational memory. Computer-based organizational memory can range from strictly archival systems to "memory banks" that continuously process information and form networks from organizational experiences and provide rapid access via search engines.

The bottom line is that organizational memory, like human memory, gets better with use. Strategic leaders must create the conditions and find methods to increase the relevance and capacity of organizational memory, and increase opportunities for members of the organization to use that organizational memory in either supporting strategic decision making, or in their strategic decision making processes.

CONCLUSIONS

This chapter has discussed a set of tools that leaders can use to make their organizations successful in VUCA environments. The systems paradigm is a "macro tool", providing an approach to analyze organizational capability through an understanding of processes that occur in organizations. This tool may be difficult for some to master but it has value for many organizational issues in the strategic environment. A tool within the systems paradigm that is particularly valuable is organizational learning. This set of processes has the potential to improve an organization's capability to respond to future environmental challenges and opportunities successfully.

By emphasizing these concepts as tools, greater responsibility is placed on leadership to use them to achieve strategic outcomes efficiently and favorably for the organization. In the chapters to follow there will be opportunities to refine your understanding of the systems paradigm and processes, and to expand your leadership style for personal effectiveness in strategic leadership and decision making.

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Merrelyn Emery

Posted on [March 15, 2012](#) by [sblachfellner](#)

Dr. Emery has worked on many aspects of human behaviour as a systemic or ecological phenomenon. These include education and continuing education, the uses and effects of media, the development of organizations and communities and human futures. Since 1970, she has worked to develop both the theory and methods of open systems theory through rigorous action and hard data research. She has researched and taught in several countries and brings a cross cultural as well as historical appreciation to her teaching and research at Concordia. She is a founding director of the **Fred Emery** Institute and has served on several diverse community and educational organizations.



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1. Can you briefly describe your field of research?

I have spent the major part of my life helping to develop a social science which actually works in practice. The conceptual framework within which I operate is called Open Systems

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Theory (OST) and every part of it has been rigorously tested in practice around the world. OST takes it as axiomatic that all systems have permeable boundaries and are, therefore, open to their environments. People are purposeful systems open to their environments, not just physical but also social. We have a global social environment which consists of all the values, ideals and expectations that people harbour. People and the social environment determine each other and as people influence each other, so they make change in their social environment. We have, therefore, a constantly changing social environment in which we have competing forces for change.

When tensions between these competing forces reach breaking point, we get huge waves of social change such as we are witnessing at the moment with the Arab Spring and the Occupy movement. At the moment the global social environment features relevant uncertainty. That makes it an unpleasant and unhealthy environment. We live in a very sick world, one in which we have a global epidemic of depression and mental illness, and we confront climate change which threatens our very existence. One of the major purposes of OST is to restore this environment to one of stability, one which is adaptive for both people and planet. To this end OST has developed reliable methods, the Search Conference for participative strategic planning, the Participative Design Workshop for organizational design and redesign, and Unique Designs for problem solving, all from a very solid and comprehensive theoretical base. Using these methods, we work with people so that they can develop on the ground solutions that take into account their own unique people and circumstances. By working together with collective responsibility, people can regain control over their own affairs, in their own communities and organizations, by cooperating to meet shared goals rather than competing or peeling off as individuals to do 'their own thing'. OST, therefore, is a practical, evidence based framework and body of knowledge that proceeds by continuously testing its ideas in practice, with real organizations and communities, to advance the probability that we can return our societies, and the planet, to health.

2. What fascinates you about cybernetics/systems research/system theory?

The world is fascinating. Exploring it is fascinating. Research is basically exploration: it is detective work. You have to follow where the data leads you. As the world consists of open systems, research using the open systems approach always holds the promise of exciting new discoveries and better ways of doing things. Over its 60+ year history, it has been delivering

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on that promise and that gives a sense of achievement and great satisfaction. But there is much, much more to be done.

3. Where do you see or would like to see the field heading? What changes would you like to see?

Overall, in the whole field of systems, I would like to see the gap closed between systems approaches that used closed and open systems frameworks. That is the subject of my paper at this conference. I regard the gap as quite unnecessary, theoretically and practically. Given the urgency of some of our problems, cooperation between the various specialities within the systems field can only help. We need them all and we need them working together to get on top of our many global problems. This can only happen if we know more about each other's specialties. I will be talking about what OST has to offer, particularly in mobilizing people to get involved in solving huge problems such as climate change. I will also be learning as much as possible about what others have to offer. Hopefully, we will be able to generate more opportunities for cooperative work.

4. What impact does your field of research have on society? What practical application for society does it have? Do you see practical applications in your own life? Can you give examples?

See above. Almost all my work has practical applications and can be used in virtually every aspect of life. It is intended for practical purposes and is tested in real settings to ensure it does work in practice. If more people understood the organizational design principles for example, and knew how to use them, we would have a lot more cooperation, energy and creativity available to put into solving the world's problems. These design principles can be used to design or redesign every organization from families to political systems, for healthier people and more adaptive results. Have I used them in my own life? Yes, all the time. I have always run a participative democratic family and I use them in all my work.

5. What's a scholar/writer, whose work inspires you in your own work?

Many people have inspired me from my dad onwards who broke all the rules by, for example, dragging me out of bed in the middle of the night when I was a little kid to see a faint comet that had just appeared in the sky – "We have a visitor from outer space" he said – enough to excite any kid's imagination. Because I was an isolated kid in the bush, most of

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my learning about the world came from books which I begged, borrowed and stole. My early heroes were the seafarers and explorers, particularly those who risked everything to learn about extreme environments like the Australian interior and Antarctica. Later, I read about scientists such as Copernicus, Galileo and Wegener who also risked everything by standing by their observations in the face of orthodoxy and vested interests. I also read huge amounts of fiction and sci fi and realized that imagination and creativity is our greatest gift, one to be used wisely. Amongst my favourite authors are Xavier Herbert who wrote *Capricornia* and *Poor Fellow My Country*, devastating portraits of the destruction of Aboriginal culture and Australian culture in general. Perhaps the most influential author was Henry Handel Richardson (who was a woman, Ethel) who wrote *The Fortunes of Richard Mahony*, a novel which is actually a picture of the slow deterioration of a person with paranoia. I found it riveting when I first read it but it was only after several years of psychology that I appreciated how acute her perceptions were. That book also made me realize that it is not just academics who search for 'the truth': acute observers like artists of all sorts perceive the reality beneath the surface and communicate it in powerful ways. Scientists such as Carl Jung and Erich Neumann understood this. The gap between science and art is an artificial one. All healthy people search for meaning. Another major inspiration in my life was living on a remote Aboriginal camp (reserve) as a child where I learnt the language and learnt how to look 'properly' and thereby learn about the physical environment in which I lived. I could never see the world in the same way again. It has shaped my life ever since. Indigenous peoples are also acute observers and scientists. But I must reserve the greatest inspiration in my life for my mate Fred Emery who never ceased to amaze me with the depth of his insights and his total dedication to his work – his desire to learn about, and to right, the world. He too was a great explorer and an uncompromising defender of the priority of evidence over the entrenched interests of the status quo.

Further Reading:

[Detailed background at Concordia University](#)

[Emery's books on Amazon](#)

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SCHOOLS AS OPEN SYSTEMS

Fred C. Lunenburg
Sam Houston State University

ABSTRACT

All public schools are open systems, although the degree of interaction with their environment may vary. Open systems contain five basic elements: inputs, transformation process, outputs, feedback, and the environment. In this article, I discuss each of these five elements of social systems. The open systems view of schools provides an excellent framework for analyzing the process of education and the role the school administrator plays in that process.

*That's why the system
manager ~~over~~ wants
to run "Indian Way"*

Schools are social systems in which two or more persons work together in a coordinated manner to attain common goals (Norlin, 2009). This definition is useful, for it specifies several important features of schools: (1) they consist, ultimately, of people; (2) they are goal-directed in nature; (3) they attain their goals through some form of coordinated effort; and (4) they interact with their external environment. The definition, however, does not elaborate on one important feature of schools deserving special attention: All schools are *open systems*, although the degree of interaction with their environment may vary.

*School
in Kahnawake*

According to open-systems views, schools constantly interact with their environments. In fact, they need to structure themselves to deal with forces in the world around them (Scott, 2008). In contrast, a closed-system theory views schools as sufficiently independent to solve most of their problems through their internal forces, without taking into account forces in the external environment. Consider a school closing or realignment of school boundaries, for example. It affects the people in the school and those outside it — in both the community it's moving from and the one it's moving to. Systems theory works on the inside and outside of the organization, as a way of understanding and anticipating the consequences of any decision (Ahrweiler, 2011).

A *system* can be defined as an interrelated set of elements functioning as an operating unit (Senge, 2006). As depicted in Figure 1, an open system consists of five basic elements (Scott, 2008): inputs, a transformation process, outputs, feedback, and the environment.

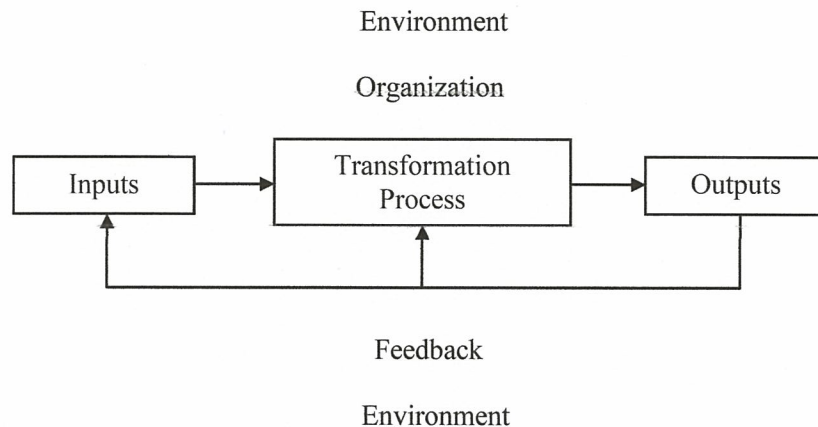


Figure 1. Open system.

Inputs

Systems such as schools use four kinds of inputs or resources from the environment: human resources, financial resources, physical resources, and information resources. Human resources include administrative and staff talent, labor, and the like. Financial resources are the capital the school/school district uses to finance both ongoing and long-term operations. Physical resources include supplies, materials, facilities, and equipment. Information resources are knowledge, curricula, data, and other kinds of information utilized by the school/school district.

Transformation Process

The school administrator's job involves combining and coordinating these various resources to attain the school's goals – learning for all. The interaction between students and teachers is part of the transformation or learning process by which students become educated citizens capable of contributing to society. How do school administrators accomplish this? Work of some kind is done in the system to produce output. The system adds a *value added* to the work in process (Shaw, 2006).

This transformation process includes the internal operation of the organization and its system of operational management. Some components of the system of operational management include the technical competence of school administrators and other staff, their plans of operation, and their ability to cope with change. Tasks performed by school administrators within the organization's structure will affect the school/school district's outputs.

Outputs

It is the principal's job to secure and use inputs to the schools, transform them — while considering external variables — to produce outputs. In social systems, outputs are the attainment of *goals* or *objectives* of the school district and are represented by the products, results, outcomes, or accomplishments of the system. Although the kinds of outputs will vary with a specific school, they usually include one or more of the

*onkwe' hon : weh : pass
but don't get educated!
stay who you are.*

following: growth and achievement levels of students and teachers, student dropout rates, employee performance and turnover, school-community relations, and job satisfaction.

Most of these require no elaboration; only the last one requires some explanation. A school must provide "satisfaction" to members of the school community beyond the physiological needs (salary, working conditions, job security) (Herzberg, 2009). Schools must provide for employees' needs for affiliation, acceptance, esteem, and perhaps even self-actualization if they hope to retain a motivated, committed work force capable of performing at maximum levels (Maslow, 1998).

Feedback

Feedback is crucial to the success of the school operation. Negative feedback, for example, can be used to correct deficiencies in the transformation process or the inputs or both, which in turn will have an effect on the school's future outputs.

Environment

The environment surrounding the school/school district includes the social, political, and economic forces that impinge on the organization. The environment in the open systems model takes on added significance today in a climate of policy accountability. The social, political, and economic contexts in which school administrators work are marked by pressures at the local, state, and federal levels. Thus, school administrators today find it necessary to manage and develop "internal" operations while concurrently monitoring the environment and anticipating and responding to "external" demands.

Since the enactment of the No Child Left Behind (NCLB) Act of 2001 (Public Law 107-110), education has been near the top of the national political agenda. The federal law nationalized the discussion concerning the well-being of public schooling in America. At the time the report was released and subsequently, there has been concern with an achievement gap in America (Darling-Hammond, 2010; DuFour, DuFour, Eaker, & Karhanek, 2010; Howard, 2011; Paige, 2011) and our academic competitiveness with other nations, particularly in mathematics and science (U.S. Government Printing Office, 2008). These achievement gaps and academic comparisons have led many people to conclude that the U.S. public school system was underperforming.

*corporate
achievement-
ments*

With recognition of an achievement gap and the rise of international educational comparisons, states began to focus their policy on standards, accountability, and the improvement of student academic achievement (Bulach, Lunenburg, & Potter, 2008; Sunderman, 2008). Statewide assessment systems were implemented nationwide. Thus was born an era of high-stakes testing complete with rewards and sanctions for low-performing schools.

The social, political, and economic forces that impinge on the school organization are not all state and national, however. Local school administrators also face a number of challenges that are exclusively local in nature, such as bond referenda, difficult school boards, and teacher unions. These local political issues can at times confound state mandated policies (Lunenburg & Ornstein, 2008). For example, school administrators often face mandated programs that do not meet the changing demographics of their student population. Teachers are often bound by union contracts that conflict with the norms of their particular school or school district. Superintendents are expected to respond to federal mandates even though resources are scarce. Zero-tolerance policies

may require expelling a student, even though it may not be in the best interest of the student to miss school for an extended period of time. And educational leaders are faced with ongoing pressures to show good results on standardized achievement tests, while at the same time dealing with a growing number of management duties, such as budgeting, hiring personnel, labor relations, and site committees resulting from school-based management initiatives.

Conclusion

Schools are social systems in which two or more persons work together in a coordinated manner to attain common goals. All schools are open systems. An open system consists of five basic elements: inputs, a transformation process, outputs, feedback, and the environment. Schools use four kinds of resources from the environment: human, financial, physical, and information resources. Through technology and administrative functions, the inputs undergo a transformation process. In schools, the interaction between students and teachers is part of the transformation or learning process by which students become educated citizens capable of contributing to society. Open systems export a product into the outside environment. In a school, the output may be students' knowledge, skills, abilities, and attitudes. Feedback serves as a control mechanism. Negative feedback from the outputs or environment can be used to correct deficiencies in the inputs or the transformation process, or both. The inputs are used to teach students who are then exported into the outside environment. These graduates continue to contribute energy to the school system in the form of one or more resources (human, financial, physical, or information). The importation of new energy into the system triggers a new cycle.

assimilated

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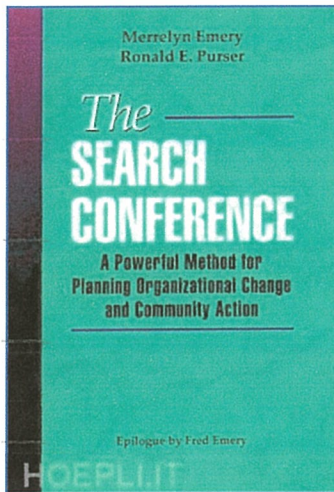
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Autore

MERRELYN EMERY is internationally recognized as a leading proponent of Search Conferences. With her husband, Fred Emery, she developed the theory and methodology of the Search Conference at Australian National University in Canberra. RONALD E. PURSER is an associate professor at the Center for Organizational Development at Loyola University in Chicago. He has conducted numerous Search Conferences and has sponsored Merrelyn Emery's Search Conference training workshops at Loyola.

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Planning pioneers Merrelyn Emery and Ronald Purser use a wealth of illustrative examples from the nonprofit, business, and public sector to define and illustrate the importance of The Search Conference as a versatile management tool. They offer a simple framework for understanding the process and clear step-by-step instructions to guide novice and seasoned facilitators in conducting their own Search Conferences.

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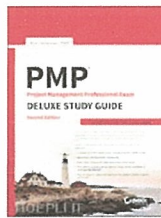
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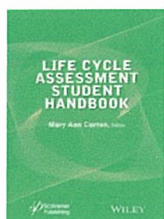
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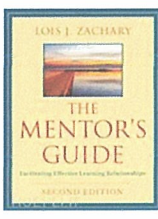
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