
Strategic Positioning for the Planning Professional: Catalyst for Change

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Agenda

- Planning & The Role of the Planner
- Role Self Assessment
- Strategic Positioning for the Planner
- Implementation Strategies

What Is Planning?

- According to the APA, Planning, also called urban planning or city and regional planning, is a dynamic profession that:

works to improve the welfare of people and their communities by creating more convenient, equitable, healthful, efficient, and attractive places for present and future generations.

Planning Director Job Description

- Oversees the recruitment, employment, evaluation, and release of staff and contract personnel.
- Supervises all organization staff, either directly or indirectly through senior staff
- Develops organization-wide or department-wide goals, objectives, policies and procedures
- Prepares division/department/organization operations budget
- Ensures that the Board of Trustees is kept fully informed on the condition of the agency and about any trends, events, or emerging issues of significance to the agency's success
- Report events and activities to senior management and elected and appointed officials
- Represents the organization on regional/local boards
- Implements General Plan or other planning projects
- Reviews all departmental reports and presentations
- Evaluates planning-related legislation and applicability to department projects
- Evaluates proposals to local governments for organization's planning consulting services
- Attends substantial number of evening and weekend meetings

Planning Director Skills

- Effective and persuasive leadership comfortable with all levels of staff, public and others
- Proven management skills and ability to manage day-to-day operations
- Strong written and oral communication skills, including the editing, oversight or preparation of technical reports, and the presentation of information to government entities and various committees
- ***Strong interpersonal and public relations skills to work effectively with various officials, staff, citizens and other customers***
- ***Strong organizational skills***
- ***Ability to understand and manage high-profile, sensitive or controversial political situations***
- ***Strong problem-solving and negotiation skills***
- Ability to exercise sound and independent judgment within general policy guidelines

Principal Planner Job Description

- Performs and manages complex and sensitive professional planning projects, research and analysis
- Monitors and ensures compliance with local, state and federal laws
- Oversees specialized planning functions such as large-scale new development proposals and environmental studies
- Provides overall management of division-related planning issues
- Advises the Planning Director on all planning-related matters
- Advises various councils, boards, commissions and elected officials in planning-related issues
- Supervises the Transportation Modeling Division of Planning Department
- Serves as liaison and performs all necessary functions in support of Planning Commission
- Assigns work to professional staff and ensures appropriate training is provided
- Evaluates operations and activities of assigned responsibilities
- Prepares reports on operations and activities, recommending improvements and modifications
- Handles sensitive personnel matters
- Participates in budget preparation and administration, monitors and controls expenditures
- Attends substantial number of evening and weekend meetings
- Serves as acting Planning Director in his or her absence

Principal Planner Skills

- *Must be innovative, detail-oriented, experienced in highly visible/controversial projects*
- Capable of managing multiple, high-priority assignments
- *Strong interpersonal skills to develop good working relationships at various levels and to resolve complaints*
- Strong analytical skills to interpret research data for reports and apply mathematic techniques in practical situations
- Reading comprehension to understand technical and legal materials.
- Ability to work on several projects or issues simultaneously
- Ability to provide effective supervision and staff management
- Ability to manage projects effectively and meet firm deadlines

Senior Planner Job Description

- Performs advanced professional work related to variety of planning assignments
- Manages complex planning studies, development applications and reviews consultant proposals
- Reviews and processes complex comprehensive plan amendments, rezonings, annexations, site plans, plats
- Develops project budgets, administers bidding process, verifies contract expenditures and compliance
- Conducts research and prepares statistical reports on land use, physical, social & economic issues
- Provides professional planning assistance to member communities on varied land use projects
- Develops transportation plans, studies and analyses on regional basis
- Works in regional program areas relating to natural/water resources planning, community development, hazard mitigation, coastal zone mgt and others
- Performs field inspections to gather data relevant to the development review process and/or to verify that development projects comply with approved plans
- Schedules and conducts meetings with advisory boards and elected officials
- Presents reports and other findings to staff, Planning & Zoning Board, and Council and serves as liaison to such committees
- Attends substantial number of evening and weekend meetings
- Supervises more junior planners within organization

Senior Planner Skills

- Excellent oral and written communication skills for preparing and presenting planning reports and projects
- *Excellent interpersonal skills for facilitating relationships with elected/appointed officials or other decision-makers*
- *Creative problem-solving skills to gather relevant information to solve less well- defined planning problems*
- *Group facilitation skills for use with community workshops*
- Ability to work on several projects or issues simultaneously
- Ability to provide effective supervision and staff management
- Ability to manage projects effectively and meet firm deadlines

“Repositioning” Strategies for the Planner

- Build the capacity of internal planning operations to provide strategic “value added”
- Build relationships with elected officials
- Be proactive in supporting change
- Facilitate and educate; coordinate and orchestrate
- Use “interventional facilitation”
- “Tenacity pays off”

Capacity Building to Increase Strategic Value

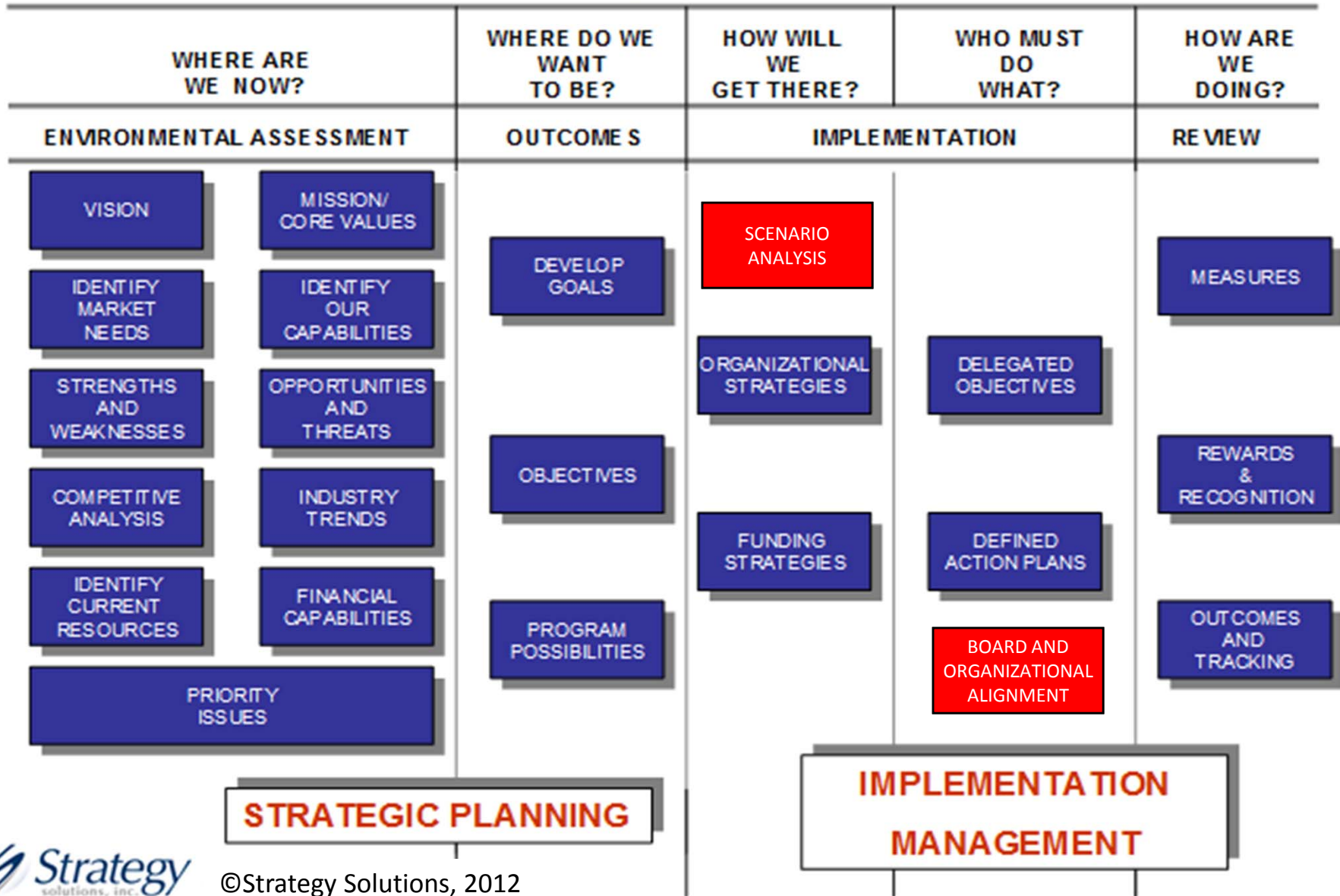
“Reinvent” the planning process to include a stronger strategic orchestration and “implementation management” focus

- Build more robust accountabilities, “outcomes orchestration” and funding strategies into the implementation sections of comprehensive plans
- Create a process for intentional “alignment” of elected officials, community leaders, agencies and developers to support plan implementation
- “Sequence” the plan implementation / investments
- Hold consultants accountable for building these elements into their plans (and, pardon me for the blatant sales pitch, encourage them to use Strategy Solutions as a Public Involvement sub contractor if they need assistance in thinking this way)



Our new model: better, and helping organizations and communities continue to evolve

Overview of the Strategic Development Process



Building Relationships With Elected Officials

- Create a “standardized” orientation program to educate new elected officials regarding the planning process and plan
- Listen to the needs and interests of each elected official and determine where and how their interests (and their election platform) “connects” with the plan and encourage them to embrace/utilize the plan
- Encourage/engage/educate elected officials to be the overall project managers/orchestrators and “status report” publishers of plan progress
- Support elected officials with “completed staff work”

Be Proactive in Supporting All Types of Change

- Specific change initiatives such as technology implementation, starting or closing a program, restructuring staff, new leadership
- More complex change initiatives such as merger, funding or regulatory changes, new program philosophies, measurement initiatives
- Sea change in industries, the environment, changing consumer preferences, social media, new types of competitors, earned revenue ventures
- Large scale, needle-moving change
- Rates of change, change, change

The change management process in communities is more complicated: both "macro" (systems level) and "micro" change (organizational level) is required

Categories of Organizational Change

- Change characterized by rate of change
 - Discontinuous change
 - Incremental change
 - Bumpy incremental change
 - Continuous change
 - Bumpy continuous change
- Change characterized by how it comes about
 - Planned change
 - Emergent change
- Change characterized by scale
 - Fine-tuning
 - Incremental adjustment
 - Modular transformation
 - Enterprise-wide transformation (By, Burnes, Senior, Dunphy, Stace)

Rosabeth Moss Kanter on Change

- Change is a threat when done to me
- Change is an opportunity when done by me
- All change looks like failure in the middle
- Change is a campaign, not a decision
- A journey of a thousand miles starts with a single step
- If you don't know where you are going, any road will take you there
- When you come to a fork in the road, take it
- Be the change you seek to make in the world

Transitions

- Transition is not the same as change
- Change is situational, transition is psychological
- Transition is individual & involves loss & letting go
- People change when they grieve the losses, see the vision and are motivated by it, understand what is expected, are reinforced in the new way
- A change can work only if the people affected by it can get through the transition it causes successfully

Lewin's Model

1. Unfreeze

- Burning platform, command, inspire, present evidence, educate, vision, plan together, restructure, set goals

2. Transition

- Boiling the frog, coach, inspire, command, educate, facilitate, small steps, involve, restructure, re-educate

3. Refreeze

- Burning bridges, present evidence, reward, realign, institutionalize, rites of passage, reward, new challenge

John Kotter's Change Principles

1. Establish a sense of urgency
2. Form a powerful guiding coalition
3. Develop a change vision
4. Communicate the vision for buy-in
5. Empower others to act on the vision & remove barriers
6. Plan for and create short term wins
7. Consolidate improvements & sustain momentum for change – never let up
8. Institutionalize the new approaches- incorporate changes into the culture

Five Principles for Change Management

1. Different people react differently to change
2. Everyone has needs that have to be met
3. Change involves loss & people experience the “loss curve”
4. Expectations need to be managed realistically
5. Fears have to be dealt with

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Questions to Lead People Through It

- What is changing?
- What will actually be different because of the change?
- Who's going to lose what?
- Why are we changing?
- What might the benefits be?
- And then what?

Questions for Leaders

- Does my team understand the big picture?
- Do they understand their role in success?
- Do they feel empowered to make decisions?
- What boundaries on decision-making are there?
- What measure are needed to measure success?
- What training does my team need?
- Are employees approaching with new ideas?
- Are new ideas well-received by leadership?

Cornelius and Associates

Some Resistance Themes

- My needs are already met here
- I am invested heavily invested here
- The destination looks worse than here
- I don't understand what is being proposed
- I don't know if I can do what will be required
- The journey looks painful
- I will lose something because of the change
- I am frightened of the unknown
- I don't trust those who are leading the change
- The change violates my values
- I can stonewall, ignore or block the change

The Resistance Zoo – F. John Reh

- **Ostriches** – head in the sand, can't see me if I can't see you
- **Moles** – burrow, hard to find, pop up later and make a mess
- **Tigers** – fight tooth and claw, mess with me at your peril
- **Dogs** – more powerful in a pack, create fear & attack
- **Owls** – smart people who sit high up and criticize
- **Snails** - go through change very slowly

And another to think about:

- **Chameleon** – appears to be completely on board then shows up as one of the other animals

*consider asking people to play the roles
they are going to play anyway*

How to Respond to Resistance

- Pause
- Listen
- Empathize
- Think
- Respond
- Enlist new ideas and specific solutions to change pressure points
- Reinforce the reason for and inevitability of the change
- Remain open and undefensive
- Use interventional facilitation techniques (see below)

How to Heighten Resistance - Reh

- Fight back, use threats, aggressive language
- Avoid talking and listening to the various people & groups
- Work solo
- Allow sponsors to be non-committal about the change
- Ignore those who resist
- Lose faith yourself in the change or appear to
- Be vague, produce non-specific plans without accountability
- Do not change reward systems to deal with and align with the change
- Avoid being the messenger of bad news
- Expect people to understand & embrace instantly what it took you several weeks to formulate
- Publicly punish those who disagree
- Make exceptions for particular people

Ten Tips for Leading Change

1. Define and understand your own reaction to change
2. Involve people who will be affected in planning & implementation
3. Communicate vision so others can buy in
4. Share all possible information with widest possible audience
5. Explain impact of change on individuals more than the organization
6. Be honest about both benefits and pain of change
7. Ask for and listen to lots of advice in change situations
8. Encourage people to talk about their feelings & what they believe they will lose as a result of the change
9. Celebrate milestones and small wins in the process
10. Grieve the losses as situations change and people are affected

Tips for Leading Change When You Aren't in Charge

- Make the boss (or the elected officials) the hero – manage up
- Develop the skills of a diplomat & create alliances
- Seek a sponsor
- Create your own center of competency
- Address your own frustrations
- Find opportunities to make a difference
- Entertain the possibility that you are wrong

John Kotter's Change Principles

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Essential Change Management Activities

- Managing stakeholders
- Setting goals
- Clarifying roles
- Developing teams
- Delivering training
- Dealing with resistance

Kanter on Campaigns for Change

Best campaigns for change have:

- Memorable messages
- Stories
- Action tools and roles
- Coalitions of partners
- “Point of action” nudges

Why Change Programs Fail

- Poor executive sponsorship or senior mgt support
- Lack of employee involvement in change process
- Absent or ineffective change champion
- Hope rested on a simple solution
- Ad hoc approach to planning & managing change

- www.businessperformance.com

Consultant as Change Agent

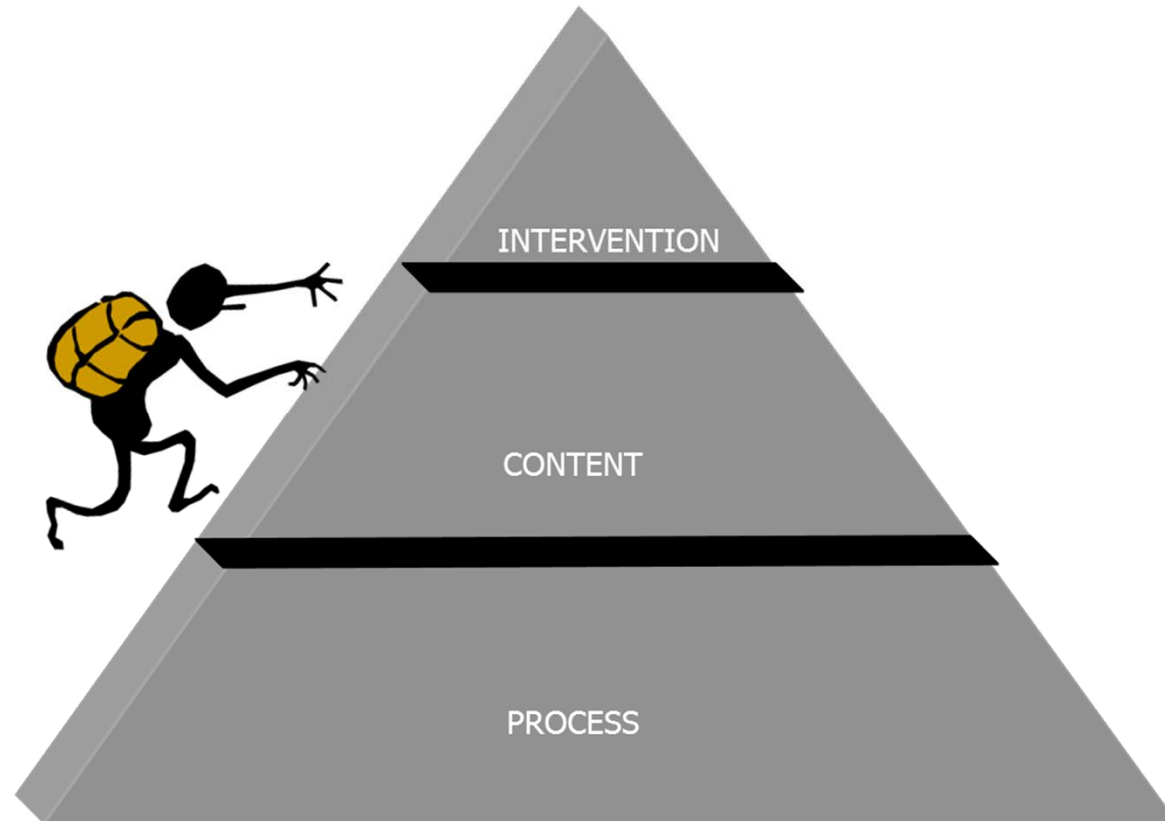
- Choose projects carefully!!!!
- Understand the nature of the change & implications
- Clarify your role & what you expect of others
- Build a bullet proof plan
- Engage the stakeholders throughout
- Develop a communication strategy
- Keep sponsors involved, publicly committed and engaged in removing barriers
- Use good project management tools & techniques
- Identify and manage risks
- Reinforce the positives

Facilitate, Educate, Coordinate, Orchestrate

Facilitation is the art of moving a team to a fact-based consensus on workable directions for an organization and on solutions to problems, and then nudging it to effective and timely execution of these solutions.

- C. Davis Fogg

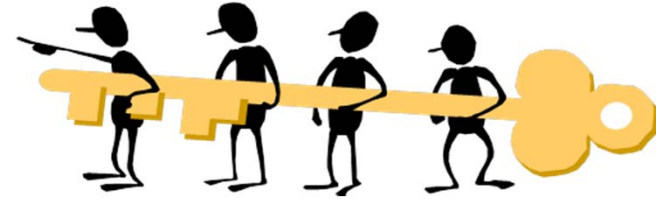
Types of Facilitation Skills



Process Skills



- Training experience
- Intimate knowledge of the process and its structure
- Superior skills in personal facilitation and meeting management
- Strong interpersonal skills
- Knowledge of diagnostic and analytical techniques



- Understanding of organization behavior and the change process – should be an internal person
- Leadership skills
- Interviewing skills
- Access to resources

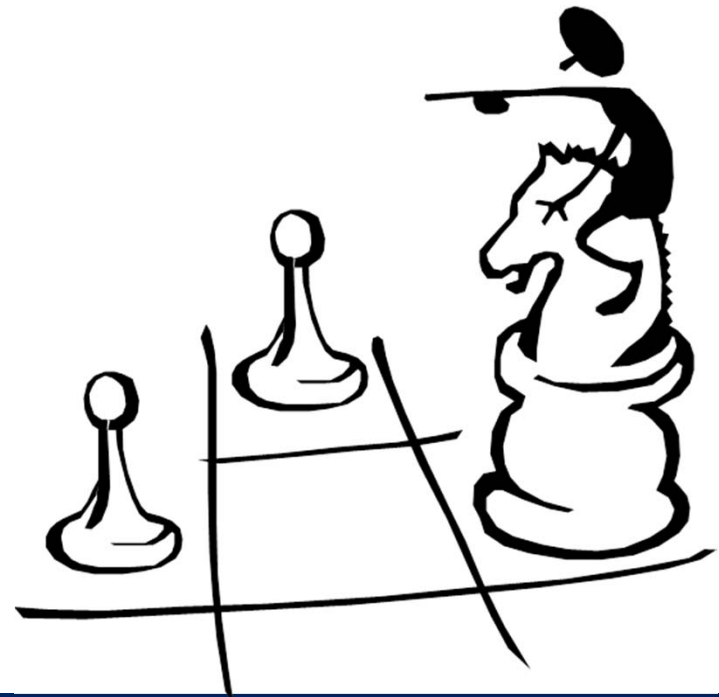
Facilitation & Meeting Management Skills



- Carry out stand-up, flexible meeting facilitation
- Build rapport
- Listen
- Probe, question for information and clarify
- Frame concepts and issues
- Restate and clarify issues
- Frame and resolving issues
- Frame and resolving conflicts
- Summarize concepts and meeting segments
- Give and receive supportive feedback
- Observe, comment on and process team and individual effectiveness
- Build trust
- Laugh at self and enjoy appropriate humor

Content Skills

- Knowledge of Strategy
- Functional Expertise
- Industry Expertise



Intervention Skills

- Personal, interpersonal and organizational intervention experience
 - Point out problems
 - Respond to requests
- Business
 - Knowledge of Key strategies and business situations
- Team management and intervention experience
 - Team process
 - Meetings
 - Content
 - Individual
- Conflict resolution skills

Facilitator's Job Description

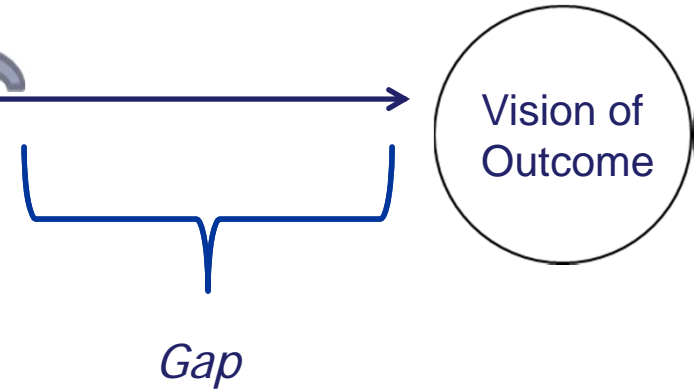
- Design the planning process to fit the community
- Produce planning manuals and instructions (or ensure they get done correctly)
- Recommend analytical and assessment tools
- Recommend where/when teams should be used
- Balance work assignments to team's pace
- Adapt process to organization's tolerance for complexity of planning process
- Build communication framework and information flow
- Balance work assignments

How Do We Approach Capacity Building/ Community Strategic Investment?

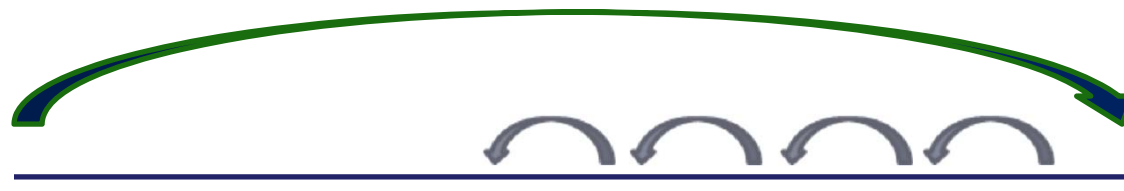
Doing Tasks/Incremental Approach



The “incremental” capacity building approach to community or organizational development is becoming more difficult to do (and sustain) and often leaves a gap..



Orchestrating Outcomes



It is significantly more effective to determine the outcome you need and “work backwards” to identify the plan that will get you there....

Interventional Facilitation

- Used when a process is “stuck,” if the vocal minority attempts to take the process in a different direction or one or more individuals/groups are unhappy or dissatisfied
- Seek first to understand: ask questions, identify individuals’ interests, competing commitments and assumptions
- Keep your own “left hand column” turned OFF

Interventional Facilitation

- Uncover the “*immunity to change*”
 - The biggest mistake leaders make is attempting to solve adaptive problems with technical solutions
- Meeting adaptive challenges requires:
 - An adaptive formulation of the problem
 - Revealing the emotional ecology underlying the challenge
 - An adaptive solution
 - We ourselves need to adapt in some way

Ecology of an Immune System

- Every immune system is an intelligent force that seeks to protect you, even save your life.
- Most people deal constantly with fear; you don't feel it because you are dealing with it
- Immune systems create “blind spots” that prevent learning and constrain action

Immune System



Mental Models

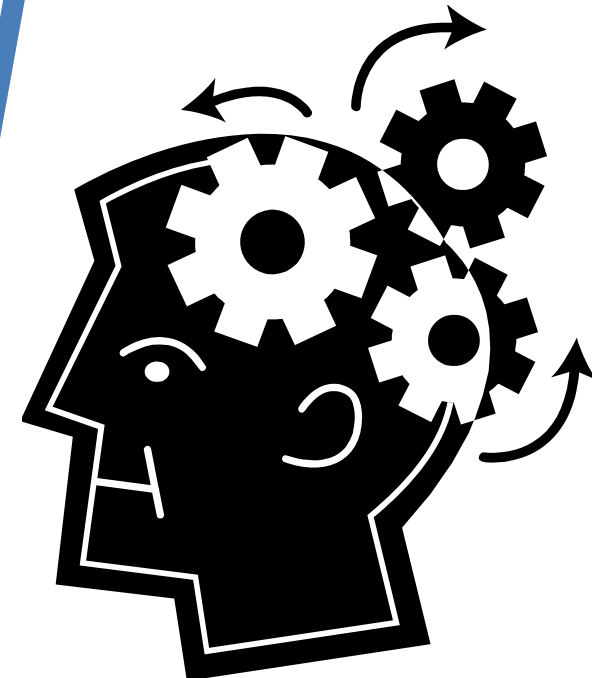
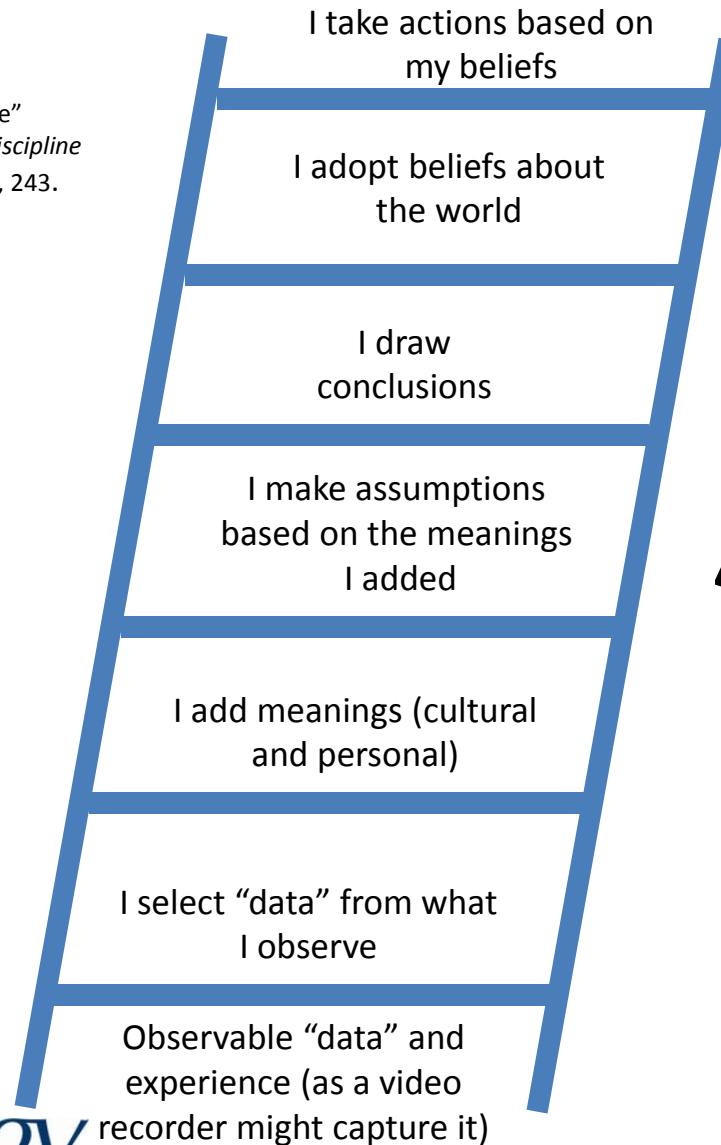
- A mental model is a kind of internal symbol or representation of external reality, hypothesized to play a major role in cognition, reasoning and decision-making



Ladder of Inference

Source: R. Ross, "The Ladder of Inference" in P. Senge, A. Kleiner, et al., *The Fifth Discipline Fieldbook* (New York: Doubleday, 1994), 243.

The biggest challenge in the dynamics of community development is people who "jump up the ladder of inference" then "take their marbles and go home."



The reflective loop (our beliefs) affect what data we select the next time

Tenacity Pays Off....

“Never doubt that a small group of committed citizens can change the world. Indeed, it is the only thing that ever has.”

-Margaret Mead

In Closing: “Repositioning” Strategies for the Planner

- Build the capacity of internal planning operations to provide strategic “value added” (and create a new “legitimate” role for the planner)
- Build relationships with elected officials (and other key leaders)
- Be proactive in supporting change (and embrace the role as a change agent)
- Facilitate and educate; coordinate and orchestrate (and ensure that consultants and others appropriately support you)
- Use “interventional facilitation” (when and where you need to)
- Remember that “Tenacity pays off” (and never give up)

Questions/Discussion

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