

Planning Department Ends, Planners' Transitions Begin

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Imagine that you're a member of a well-respected planning department, doing good and necessary work. Municipal amalgamation and organizational change are on the way but you have no hard information on how it will affect you personally. One day you find out that the department will be coming to an end soon but you still don't know what will happen to your job, the projects you've been working on, your colleagues and friends, your future. Imagine what thoughts would be running through your mind and how you'd feel.

Shift Happens.

Staff of the former Regional Municipality of Ottawa-Carleton don't have to imagine. It happened to them

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last year, culminating a period of uncertainty that began in July 1999 when the Minister of Municipal Affairs and Housing announced that municipalities in the region would be restructured in time for the November 2000 elections. A month later the Province appointed former Clerk of the Privy Council, Glen Shortcliffe, as Special Advisor and gave him 60 days to recommend municipal government reforms that would lower taxes, improve services, reduce bureaucracy, clarify responsibilities and fostering greater accountability. His proposals were accepted and the Province proceeded to eliminate the two-tier structure, replacing the 12 municipal units with the new mega-city of Ottawa (pop. 750,000) as of January 1, 2001. Among those dissolved was the RMOC, along with its Planning and Development Approvals Department.

Management consultant William Bridges distinguishes between change, which the organization makes as it moves to a new form, and transition, which is what people have to go through to come to terms with the change. In amalgamations, downsizings, mergers and the like, most of the planning is directed toward enacting and managing the change; personal transitions get much less, if any, attention. In this case the Minister appointed a five-member Transition Board to establish capital and operating budgets for the new city, create savings targets, recruit senior management personnel, impose salary and benefits freezes, support the municipal wind-up, and generally assume municipal powers for the year 2000. But here,

"transition" really meant "change," in Bridges' terms, and it was imposed rather than voluntary. Municipal employees could only hold their collective breath, wait and see.

Designing a Transition Workshop

In August 2000, Pamela Sweet, then the RMOC's Director of Policy and Infrastructure Planning, invited me to design and conduct a one-day workshop for the planning divisions' professional and support staff affected by these changes. Her intent was twofold: to create a setting where participants could explore, vent and share views on the upcoming changes/transitions; and to honour the Region's past planning accomplishments, consider what should be carried forward, and prepare for phasing out. Subsequently, we added another component recognizing that different people respond differently to change and transition. For example, some welcome change and see it as an exciting challenge, full of opportunity; others fear or resist change, have more trouble letting go of the past, and are less effective in adjusting to the realities. To help uncover and address these important differences, the workshop incorporated the Myers-Briggs Type Indicator, a widely used tool for addressing psychological functioning, an important dimension of individual diversity.

When you take the MBTI, it sorts your preferences along four scales. Everyone uses all the preferences but, type theory says, most of us favour one in each pair.

1. Where you prefer to direct your attention and get your energy: if Extraversion, the outer world of people and activity; if Introversion, the inner world of thoughts, feelings and memories
2. How you prefer to take in information: if Sensing, by focusing on what is real, tangible and actually happening; if Intuition, on possibilities, patterns and a sixth sense (hunch, insight, gut instinct)
3. How you prefer to make decisions: if Thinking, in a logical, objective and impersonal way; if Feeling, more subjective, personal and people-oriented
4. How you prefer to deal with your outer world: if Judging, in a planned, orderly, decisive manner ("love of closure"); if Perceiving, flexibly, spontaneously, going-with-the-flow ("love of process").

Each of these dimensions has obvious connections to planning. Less readily apparent are the links to change and transition (see Barger and Kirby). Through the MBTI, people are better able to understand and appreciate their own responses to what's happening, discover that some of these are shared and some are different, expand their range of options, and support each other in this difficult time.

Late in September, staff of the Department's planning divisions received an invitation to the workshop, explaining its objectives and how it would operate, along with a request for information concerning what they'd like to see happen and not happen at the workshop. They were also asked to reflect on their time with the organization, recall activities they'd been involved with that they felt especially proud of, and name one thing that they would like to see continued by the new organization. Most of those invited responded positively. They received the MBTI, completed the answer sheet and returned it for computer scoring.

Workshop Conduct

The workshop was held on October 12, 9am to 3pm, at an offsite location in Ottawa. Attendance numbered 36 (five others who completed the MBTI were unable to attend): three planners/managers, 18 additional planners, five engineers, and 10 support staff (including two students).

Tension in the room was palpable as the workshop began. Soon, however, I became aware of the esprit de corps in this group whose members had shared a lot and now faced a common ending together. Opening remarks by Commissioner Nick Tunnacliffe highlighted the many accomplishments of the Department over its 32-year history. This was followed by an experiential exercise to "normalize" change and discuss how it makes us feel. We talked about the difference between change and transition, which everyone in the room was going through in one way or another, and the fact that we always have some measure of control over what happens - if not over the change itself then over how we perceive and respond to it.

This set the stage for an introduction to personality type, distribution of individual reports on MBTI results, and identification and verification of each participant's 4-letter type. In a series of exercises focusing on each of the four preference pairs in turn, participants learned more about their and others' types along with the value of difference. Here are some examples

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that showed up. Extraverts and introverts (61% and 39% of the group, respectively) wanted different kinds of interaction. Sensing and Intuitive types (39% and 61%) saw dissimilar things in the same data. Thinking and Feeling types (66% and 34%), given a hypothetical situation, reached the same conclusion but on divergent paths of reasoning. Judging and Perceiving types (46% and 54%) demonstrated quite-unlike attitudes toward work/play. By lunch time, enthusiasm was running high as people acquired fresh insights into everyday workplace behaviours plus a new vocabulary to "discuss things personal without getting too personal."

The afternoon session waded into deeper water and the harder work began. In preference-alike groups, participants homed in on what they had the most difficulty with, wanted/needed, and were able to give to others during this time of transition and change. Differences became more

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apparent: time to talk things out vs. time to think things through; specific detailed information about upcoming changes vs. more on the overall rationale with opportunities for input; the underlying logic of the change vs. the impacts on people affected; a clear plan of action with realistic timelines vs. more information with allowance for alternatives. As ideas emerged, participants were encouraged to form interest groups for advancing them to action.

Endings and loss were addressed next. For Bridges (aptly named!) transition is initiated by an ending, on the way to a new beginning. In between is "the neutral zone," a nowhere between two somewheres. It's a time when the old way is gone but the new path is not yet clear, where one life chapter is closing and the next one hasn't yet opened. This is an important period for sorting things out, staying with feelings instead of trying to escape them (the #1 temptation is to get away rather than "holding the space"), restoring personal balance, taking extra good

care of self, and regrouping before moving on. Doing otherwise risks depression, blocked creativity, extra stress and career problems, Bridges claims. Yes, he says, transition is disruptive, but it can also be profoundly positive.

Loss requires grieving. Naming losses is an initial step in mourning them and eventually letting go. The next exercise was risky: in type-alike groups, participants were asked to consider the changes happening in their workplace and identify the losses they experienced or expected. Losses singled out as most difficult were (in no particular order) friendships, current undertakings and goals, effective and productive working teams, leadership, employment, location and setting, contacts, organizational culture and environment, familiarity and the corporate entity. The ensuing discussion showed how different people experience different losses and feel their significance differently - e.g., Sensing types tend to focus on the loss of things as they are now while

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Intuitives are more likely to highlight foregone possibilities and what-might-have-been. At the same time, people have varying strengths that can be activated for self- and mutual support.

Making a good ending is essential for a good transition. If this isn't done, the danger is getting stuck in the neutral zone and hanging on too long to what has to be relinquished. The final exercise aimed at, first, helping participants recognize what they needed to say goodbye to and let go of as the Department came to an end, and second, determining how they could celebrate its accomplishments and honour the past. Small groups pinpointed achievements of which they were particularly proud, times when they felt they'd made a difference. To name a few: regional official plans, strategic planning and team building, the transitway, environmental programs and ecological planning, economic reports, infrastructure improvements, various proactive policies, a community vision, quality service, an efficient approvals process. Among the endeavours they hoped would be continued in future were environmental policies and programs, protection of natural areas, transitway and alternative modes of transportation, urban design incorporated into planning decisions, improved cultural landscape, a rural service strategy, and a balanced comprehensive official plan.

By now, energy in the room was at low ebb. But it revived as the group brainstormed suggestions to mark the Department's demise. Proposals for a wake and a bonfire especially reinvigorated people and stimulated their creativity. Other ideas included a big party, a group photo or video, a monument or time capsule, planting a tree, purchasing a bench, and creating a future contact-list.

That brought the workshop to an end. My closing remarks offered one bit of advice: "strategic procrastination" (Wilkins): intentionally putting off

making a determination about an unwanted event until you get evidence about its possible benefits; staying open to information about the upside until you can see what it might be. Something that looks bad now may turn out to be a blessing in the longer

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run and that's more likely to happen if given a chance. It's simply not, "Keep smiling." Just "Defer judgement awhile" – a special challenge for those who prefer Judging, as many planners do.

Aftermath

The evaluation, administered and collated by Department staff, indicated that the workshop's objectives had been achieved. In summary, "The response was overwhelmingly very good or excellent." Participants said they most liked: the interaction and camaraderie; seeing and sharing how others were facing the transition; recognizing and appreciating different perspectives ("an eye-opener") together with their strengths and weaknesses; better understanding how we react to and deal with change and transition; discussing common history and future; focusing on softer skills; the informal atmosphere; and the use of humour.

For my own part, I was most impressed and touched by the way they were handling a transition that had to be

disorienting, frustrating, painful and anger-generating. Surely there must be better ways to make such changes. Using methods that are far less arbitrary and brutal, and losing the dispassionate decision-making from on high (amazingly, the Advisor called his 60-day process "democratic" and the Board claims to be "involving all stakeholders in collaborative development of problem-solving and work solutions"). Providing more and better information to those affected. Fully acknowledging their contributions, their loyalty, and the care they have for their work and their communities. Paying explicit attention to the personal impacts of change. Above all, recognizing that efficiency and cost-cutting cannot be everything. The ultimate irony is that most amalgamations do not deliver these outcomes, as Andrew Sancton's extensive research shows and the new Toronto disastrously demonstrates. Ottawa's mayor recently declared a "financial emergency" as transition costs ballooned to \$189 million (Shortcliffe estimated \$50 million). It brings to mind the old Pete Seeger song, When Will They Ever Learn? It begs for common sense.

What happened to the employees involved? Senior managers were offered voluntary exit packages (topping the list, the Region's acting CEO received \$587,135). Others will have to make do with yet-to-be-finalized compensation through union agreements. A few found positions in the new City (only two of the 14 senior planning positions filled to date, early March, went to employees of the former Region's Planning Department). Others secured employment elsewhere. Some took early retirement. Many are still in limbo and may be for some time.

What to make of all this? As planners, we see our function and service as essential to society, yet planning is also subject to the forces on and in that society. One of these is increased complexity and its backlash, the seductive appeal of simplistic solutions simply justified ("We believe this is best and will work"). Planners at the former-RMOC know this phenomenon all too well but they weren't its first victims and won't be the last. Understanding and being able to cope with the inevitable transitions in their fullness, therefore, is a survival skill in this 21st century.

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