

Planning + Engineering

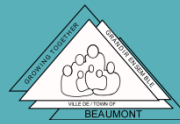
# Planning for Positive Change: This is not your everyday Operational Plan!

**CPAA Conference**

May 3, 2016

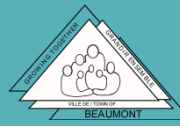
**Eleanor Mohammed, MTCP, RPP, MCIP, EP**  
**Director, Planning and Engineering**

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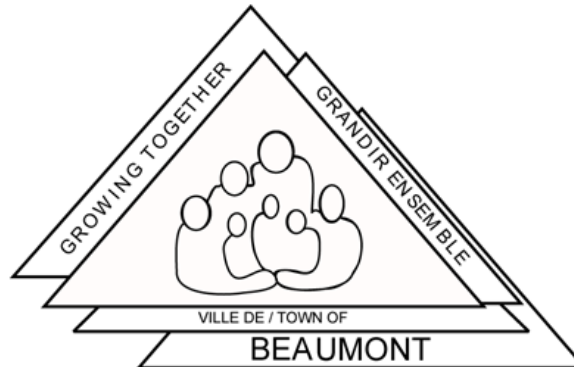
## Lets talk about change...



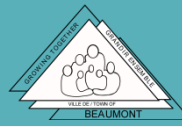


# The Operational Plan

2016 - 2019



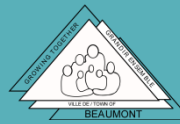
**[PLANNING AND INFRASTRUCTURE  
DEPARTMENT OPERATIONAL PLAN]**



# The basic steps of preparing an Operational Plan

## Continuous Check-ins

1. Get the 'Buy-in'
2. Book the mandatory Team sessions
3. Facilitate the conversations and collect 'the goods'
4. Build the draft plan & review with Team
5. Finalize the draft plan
6. Implement and share the plan
7. Monitor and update



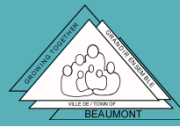
# The beginning of positive change...

## ○ What we are doing...

- Resetting ourselves and our department
- Looking at our organization and how we fit in
- Learning from the past
- Looking to improve
- Listening to each other and our ideas

## ○ What we are not doing...

- Blaming others
- Living in past
- Enabling poor behaviour
- Throwing out the good with the bad

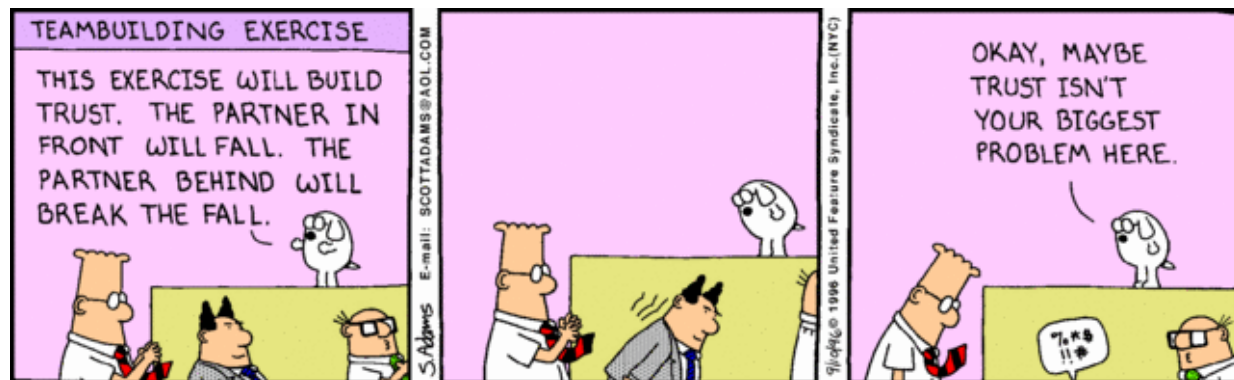


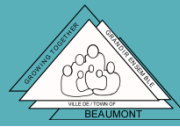
## Facilitated Sessions – Operating Principles

1. Show up on time and be present
2. Every voice around the table counts
3. Engage with honesty and good intent, while respecting that some topics may be sensitive to others on the Team
4. Give space for others to share thoughts and opinions
5. New (and old) ideas will be properly considered and not immediately shut down
6. Cell phones and emails are not more important than the people in the room
7. We will not spoil the other group's sessions by divulging the process and conversations at our sessions. Session summaries, pictures and scans will be provided to both groups at the same time; once both groups have completed each session.

## Facilitated Sessions – Ice Breakers

1. Quickly name one thing that your co-workers don't know about you.
2. You're exiled to a deserted island and you can only take one item with you. What would you take and why (you cannot take a boat!)?
3. If you had to give up one of your senses (hearing, seeing, feeling, smelling, tasting) which would it be and why?





## Facilitated Session # 1 – The Bug Collection

What personally and professionally bugs you about work, our office, and how we operate? What are the common ones? What are the weird and random ones?

### ○ What's the point?

- To get us to air the things that have been bothering us
- To conduct an Internal Team environmental scan
- To illuminate specific areas of need
- To check-in on some of the previous discussion
- To get a snap-shot in time of where we are now
- To explore, gather, and prepare ourselves to generate new ideas

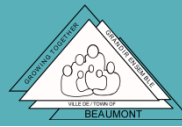






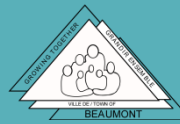
# Facilitated Session # 1 – Bug Collection

<p><b>Meeting</b></p> <ul style="list-style-type: none"> <li>- Righting of Wrongs</li> <li>- Media as a Resource</li> <li>- Public Presentation</li> <li>- Part of Space of their agency</li> </ul>	<ul style="list-style-type: none"> <li>- I hate the way the coffee from Friday is always left only for me</li> <li>- I hope one that not everyone has a choice in keeping the kitchen clean by signing up for kitchen duties</li> <li>- In Reg for what the Team does it is created as long as like a Reception Area, Receptionist or Customer Services but those don't contact with a client then and have skills but they persons work what someone is call</li> </ul>	<p><b>Lack of Trust - People</b></p> <ul style="list-style-type: none"> <li>- People who are late for meetings</li> <li>- Meetings that don't end and creep into other meetings</li> <li>- People who make you late for meetings</li> </ul>	<ul style="list-style-type: none"> <li>- Response of Council Members in Public Forum</li> <li>- Responder and Submission of Low rate Submission/Development Plans</li> </ul>	<ul style="list-style-type: none"> <li>- People who are late for meetings</li> <li>- Meetings that don't end and creep into other meetings</li> <li>- People who make you late for meetings</li> </ul>
<ul style="list-style-type: none"> <li>- Close mindedness</li> <li>- Complaining without taking steps to remedy an issue</li> </ul>	<ul style="list-style-type: none"> <li>- "Learn from" - Homestead in the office</li> <li>- "Inquiries for memo / agenda etc to employees"</li> <li>- More space for meetings other than the Council Chambers/Boardroom</li> </ul>	<ul style="list-style-type: none"> <li>- Not enough Plants</li> <li>- Angry people at the front desk</li> <li>- unnecessary angry customers</li> </ul>	<ul style="list-style-type: none"> <li>- Note the pinned card, it is a list of items</li> <li>- It is a list of items which are being dealt with and it is a list of items which are being dealt with and it is a list of items which are being dealt with</li> </ul>	<ul style="list-style-type: none"> <li>- People who are late for meetings</li> <li>- Meetings that don't end and creep into other meetings</li> <li>- People who make you late for meetings</li> </ul>
<ul style="list-style-type: none"> <li>- Within what we speak</li> <li>- The way we speak</li> <li>- Lack of clear steps for all staff</li> <li>- Support to work - not enough</li> <li>- Not been able to accumulate</li> </ul>	<ul style="list-style-type: none"> <li>- Developers/Public who go to the CAO before we have a chance to address an issue</li> <li>- Seeing people "beat down" and worn out</li> </ul>	<p><b>Worse</b></p> <ul style="list-style-type: none"> <li>- Priority of working</li> <li>- Priority of value</li> <li>- Efficiency of working</li> </ul>	<ul style="list-style-type: none"> <li>- Not starting meetings on time - making invitees wait out front in the meantime</li> </ul>	<p><b>TIME SHEETS</b></p> <p>SILLY</p> <p>REACTIVE</p> <p>PROACTIVE</p>
<ul style="list-style-type: none"> <li>- Negativity</li> <li>- Not being Solutions oriented</li> <li>- Poor communication</li> </ul>	<ul style="list-style-type: none"> <li>- Micro Management</li> <li>- Unclear lines of authority</li> <li>- Unclear systems or no systems</li> </ul>	<ul style="list-style-type: none"> <li>- Employee Bashing</li> <li>- Hot offices</li> <li>- People who clip their nails @ the office (vet to be seen here@10)</li> </ul>	<p><b>MENS BATHROOM</b></p> <p>OLD</p> <p><b>TONAS</b></p> <p>TECHNOLOGY</p> <p>LAUNDRY</p>	<ul style="list-style-type: none"> <li>- Council should have more power in making things to make the council better and the town</li> <li>- Council should have more power in making things to make the council better and the town</li> </ul>
<ul style="list-style-type: none"> <li>- During meetings people being occupied as their phone then participating in discussion</li> <li>- Decisions being made at a lower level than could be made at the members level</li> </ul>	<ul style="list-style-type: none"> <li>- Micro Management</li> <li>- Unclear lines of authority</li> <li>- Unclear systems or no systems</li> </ul>	<p><b>Worse</b></p> <ul style="list-style-type: none"> <li>- The description of the way of the way</li> <li>- Communication between Department Areas</li> <li>- Department Areas</li> </ul>	<ul style="list-style-type: none"> <li>- Who sets speed limits in town?</li> <li>- Plan to hurry up and wait</li> </ul>	<ul style="list-style-type: none"> <li>- Negative communication from the Council and Development Committee</li> </ul>
<ul style="list-style-type: none"> <li>- Feeling Overwhelmed, Seeing People overwhelmed</li> <li>- Having folks @ Capacity knowing that more work is coming</li> </ul>	<ul style="list-style-type: none"> <li>- While the Town Staff is expanding, there's limited room when new employees start</li> <li>- Being briefed after council meeting in an email rather</li> <li>- Procedures are important to the staff but there's no repetition or training to implement them when the council</li> </ul>	<ul style="list-style-type: none"> <li>- People who clip their nails @ the office (vet to be seen here@10)</li> <li>- People who clip their nails @ the office (vet to be seen here@10)</li> <li>- People who clip their nails @ the office (vet to be seen here@10)</li> </ul>	<ul style="list-style-type: none"> <li>- I wish there was a Department area in town and it would be good to have a Department area in town and it would be good to have a Department area in town</li> <li>- I wish there was a Department area in town and it would be good to have a Department area in town</li> </ul>	<ul style="list-style-type: none"> <li>- Employees to have the power of decision to make properly (ask chair with support)</li> </ul>



## Facilitated Session # 1 – The Metaphor Exchange

- In Part A they will identify a metaphor for what they believe the department is today.
- In Part B they will identify a metaphor for what they want our department to look and feel like in 3 years. Also in Part B, the participant will briefly list the systems, traits, and expectations that support their future state metaphor.
- Then as a group, sheets are passed to the participant to the right. This participant will then add to the list of systems, traits, and expectations that supports their neighbour's metaphor.
- Once each participant is done adding to their neighbour's sheet, we will once again pass the sheet to the right for the next participant's input. We will repeat this process until each sheet makes it back to the original participant author.



## Strategic Planning: Building our Operational Plan – Session 1, Metaphor Activity

**Part A:** Identify a metaphor that describes what our department is today. Provide a brief explanation to describe this metaphor.

Driving a Car with square tires:

- Things aren't running smoothly
- No time to change tires to round
- Can't see that tires are square
- Too busy to book it
- do not realize that it's as easy booking an appointment (or getting organized) to make the change needed
- Need to stop comparing our car with square tires to other cars w/ square tires.

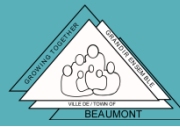
**Part B:** Identify a metaphor that describes what you want our department to be in 3 years. Briefly list the systems, traits, and expectations that support this future state metaphor.

A high functioning LRT System:

- ↳ direction is clear
- ↳ All stops are communicated ahead of time.
- ↳ All walks of life and abilities are accommodated
- ↳ You can ride the system with your friends.
- ↳ It's dependable + timely
- ↳ All routes are properly scoped out and planned.

- ENSURE MAINTENANCE PLAN IS DEVELOPED AND IMPLEMENTED It's heavily subsidized so that everyone can use it.
- MARKET the use of system CURRENT PICK UP/DROP OFF SCHEDULES ALWAYS IN USE.
- EXPANSION PLAN BE PREPARED ADVERTISING/MARKETING WELL EMPLOYED/IMPLEMENTED
- AFFORDABLE FOR ALL
- Complete all required maintenance to the LRT to ensure that it continues down the right path while anticipating upgrades ahead of time
- ENSURE A WELL-QUICK EMERGENCY RESPONSE TEAM WITH DEFENSIVE PROPERTIES TO DEAL WITH DERAILMENTS AND CAPABLE OF HANDLING PAINTING THROUGHOUT THE TRENCH.
- It is safe & accessible
- It is integrated seamlessly w/ other forms of transportation (buses, cars) active bus

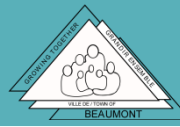
# A Scan from the Metaphor Activity



## Facilitated Session # 1 – The Metaphor Exchange

### ○ What's the point?

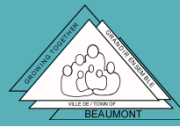
- To acknowledge and bring meaning to how we feel that the department looks and operates today
- A positive way to determine and visualize our future state
- To provide a visualized metaphorical contrast between our current and future state
- Promotes creativity and solutions-oriented thinking
- Enables us to accept and build upon each other's ideas
- Identifies the commonalities of where we want to be in 3 years



## Facilitated Session # 1 – The Group Discussion

To answer the following questions –

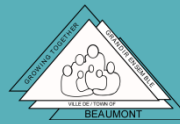
- a) What are some concrete examples of how we exude the Town's values of:
  - ✓ **Accountability:** accept responsibility for decisions and actions
  - ✓ **Excellence:** continuously strive for quality and improvement and to meet expectations
  - ✓ **Integrity:** be honest and open
  - ✓ **Respect:** an inclusive community that holds colleagues and all those serving the community in high regard
- b) What additional values are important to us in our everyday operations?
- c) What are some concrete examples of how we exude these values?
- d) Are there new ways that we can better convey our values when interacting with residents, developers, stakeholders, Council, etc.?



## Facilitated Session # 1 – The Group Discussion

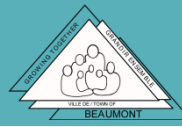
### ○ What's the point?

- To capture how we implement the Town's values
- To identify the additional values that serve the Planning and Engineering Department
- To acknowledge values and Professional Codes of Conduct for Registered Professional Planners, Certified Engineering Technologists, Certified Local Government Administrators and Development Officers
- To identify how we can better convey our values in the services we provide



# Strengths, Weaknesses, Opportunities & Threats (SWOT) Analysis

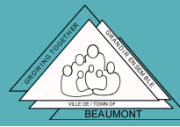
Analysis Element	<b>Finance</b> - our budget, revenue and expenditures and the relationship between them.	<b>Communication and Reputation</b> - how we can better communicate and represent ourselves	<b>Operations</b> - what services we provide and how we provide them	<b>Human</b> - the people part of our team - recruiting, developing, supporting, and compensating our team members.	<b>Resources and Technology</b> – our capacity to provide services to our clients. Capacity is a function of production within a defined timeframe.	<b>Innovation</b> – our ability to create and implement new ideas; to be solutions oriented
Strengths						
Weaknesses						
Opportunities						
Threats						



## Strengths, Weaknesses, Opportunities & Threats (SWOT) Analysis

- **Strengths** - are those aspects of our operations that have allowed us to achieve our success to date
- **Weaknesses** - are those aspects of our operations that have not allowed us to achieve our desired success to date
- **Opportunities** - Can come from within the organization - e.g. better relationships with other departments. They can also come from outside of the organization, such as developing partnerships.
- **Threats** - Can come from within the organization (outside the department). eg. poor relations with other departments, or losing key employees. They can also come from outside of the organization, negative perceptions of the Town, etc.





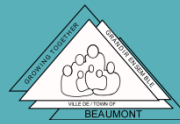
## Facilitated Session # 2 – Checking-In

Checking-in on the SWOT analysis table in the draft Operational Plan: Is there anything missing?

More opportunities will be populated in the SWOT table after facilitated Session # 3

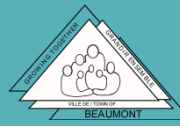
### ○ What's the point?

- In our activities to date, we have been identifying our strengths, weaknesses, and threats; it's time to check-in to see if we've captured everything or if it's been captured correctly
- An opportunity to add to the SWOT analysis
- An opportunity to see how our activities are building our Operational Plan
- To remind ourselves of why we're engaging in this process



## Facilitated Session # 2 – Surfacing Our Assumptions

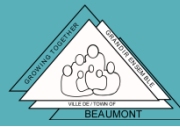
- As a group identify **five issue statements**, please list all of your assumptions that support or do not support each statement, then list a matching counter assumption.
- **For example:** Suppose you chose to wear informal clothes to work: why do you do this, and what assumptions are you making....
  - Assumption 1: I assume that my colleagues don't mind how I dress.
  - Counter Assumption 1: Perhaps they actually find my clothes style offensive
  
  - Assumption 2: I assume that informality conveys relaxed values
  - Counter Assumption 2: Perhaps it conveys that I am scruffy and disorganized



## Facilitated Session # 2 – Surfacing Our Assumptions

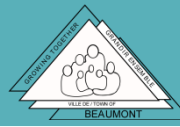
### ○ What's the point?

- To make our underlying assumptions clear to the team;
- To question our own personal assumptions;
- To understand why some Team Members are engaging in certain behaviours; and
- We can't address what is not voiced.



## Facilitated Session # 2 – Multiple Redefinition

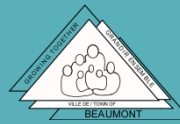
1. You have been given five handouts. Please take each of the issue statements above and write them into the issue statement box and then work your way through the handout. The more creative your answers the better! When you complete each sheet, please write your redefined issue on the chart paper at the front of the room.
  2. Once everyone has written their redefined issue on the chart paper, we will have a dotmocracy vote to determine the redefined issue that we are going to continue to work with for the Fishbone Diagram Activity.
- What's the point?
    - With open-ended issues, the solvers are unlikely to hit on a satisfactory description at the outset – by definition (open-ended), the boundaries of the issue are fuzzy. Also, connected to our last activity, different team members will have different issue boundary perceptions (assumptions). Therefore it's necessary to further refine/redefine the issue to a point that we can start to solve.



Issue Statement: There is a problem with our customer service

1. There is usually more than one way to looking at problems. You could also define this one as....
2. But the main point of the problem is.....
3. What I would really like to do is.....
4. If I could break all laws of reality (physical, social, etc.), I would try to solve it by....
5. Another even stranger way to look at it might be...
6. Now return to the initial issue statement, write down whether any of the redefinitions have helped you see the issue a different way (restate the issue)....

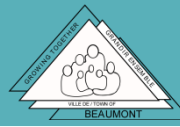
## Example of Multiple Redefinition Handout



## Facilitated Session # 2 – Fishbone Diagram

This is a facilitated discussion that uses a fish skeleton to frame-up solutions to the issues that have been refined in the previous activities. Each fin represents a big-picture solution and the sub-fins are the ideas and details of that support that solution.

- In the fish diagram, we frame the wording of the solutions with:
  1. We can...
  2. We will...
  3. I will...
  4. I can....
  5. We need...
  6. I need...

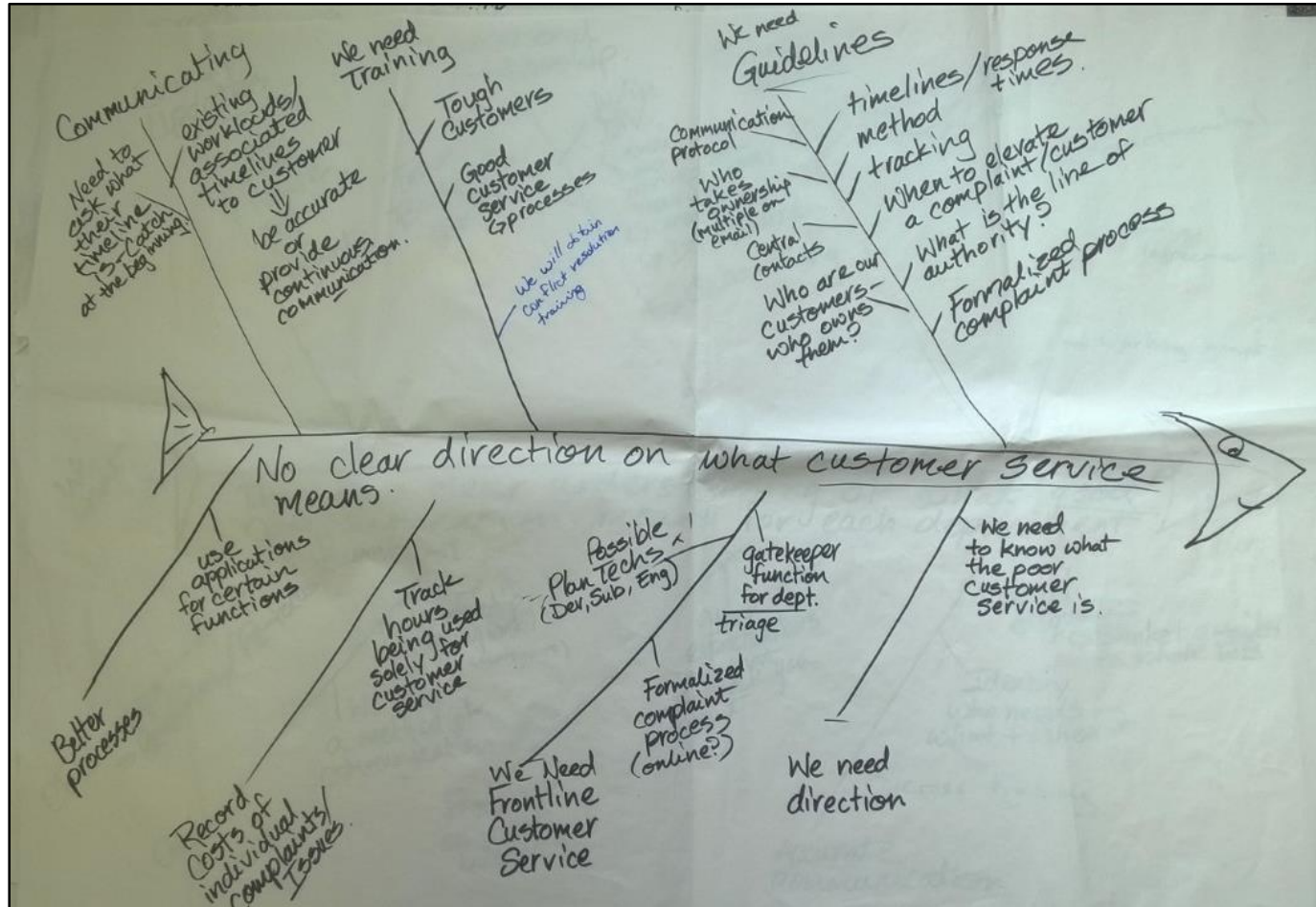


## Facilitated Session # 2 – Fishbone Diagram

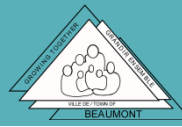
- What's the point?
  - To develop solutions and opportunities for the SWOT analysis;
  - To take ownership and control of where we want to go in the next three years; and
  - To determine the future outcomes/goals for the Operational Plan, along with specific actions.



## Facilitated Session # 2 – Fishbone Diagram

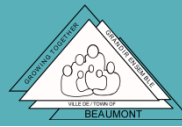






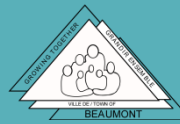
## Facilitated Session # 3 – Checking-In and Prioritizing

- In a facilitated discussion use fish diagram ideas and identify strategic projects for Planning and Engineering – 2016 to 2018. Once the projects are identified, prioritize them based on need and impact.
- **What's the point?**
  - To provide the information needed for the strategic projects section of the Operational Plan
  - To make sure that we capture everything that is important to us and our Division.



## Drafting the Plan

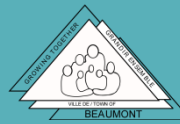
- Develop draft Vision, Mission and Team Values
- In order to work towards the Vision and execute the Mission, identify desired outcomes for the department's operations to be measured against
- Use the Appendices for:
  - Summarizing the facilitated sessions and results
  - Organization details for the team – i.e. distribution of work
  - Summarizing Professional Standards and Ethics of certified Team members (P.Eng., RPP, SCO, etc.)



## The Strategic Work Plan

Analysis Element	Operational Plan Outcomes	Objectives	Actions	Timeline Start & Finish	Success Indicators	Lead	Other Departments /People involved	Quarterly Status and notes
Finance								
Communication & Reputation								
Operations								
Human								
Resources / Technology								
Innovation								

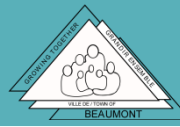
- As a result of the facilitated sessions and analysis, the Strategic work Plan is developed to build on the Team's strengths, address weaknesses, take advantage of opportunities, and deal with potential threats.



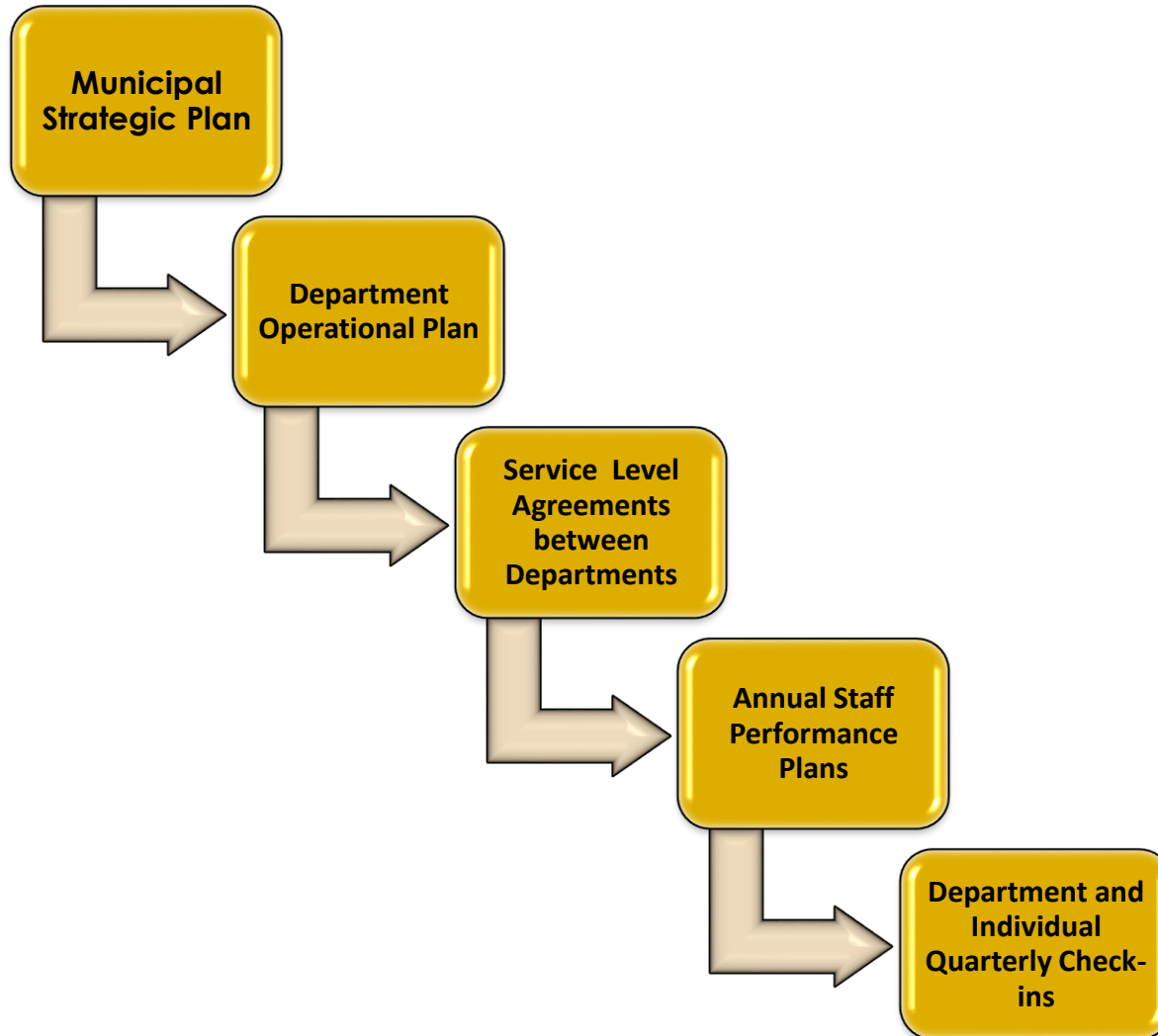
## The Project Work Plan

Project	Description / Scope	Lead	Budget	Timeline Start & Finish	Town's Strategic Plan Reference	Priority / Impact	Other Departments /People involved	Quarterly Status and notes
A								
B								
C								

- The Project Work Plan contains the annual projects for the Town. There is a separate Project Work Plan for 2016, 2017 and 2018.
- The Project Work Plan is annually rolling and the Strategic Work Plan will be fully re-examined through a facilitated process every 3 years.

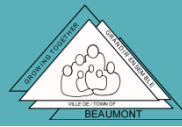


# Formal Implementation & Monitoring



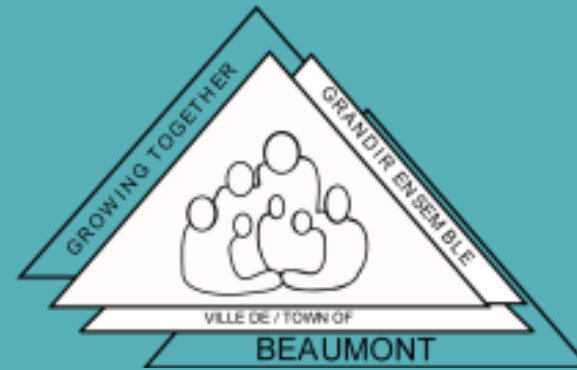
## Keeping work positive and the Team resilient





## Lessons Learned

- **Be flexible:** You may not get through all the exercises in a facilitated sessions.
- **Understand hierarchy:** There can be confusion between the Municipal Strategic Plan Vision, Mission and Values and the department Vision, Mission, and Values. They should be interconnected.
- **Assist Others:** It's difficult to develop service level agreements between departments when others may not have completed an operational planning exercise.



Planning + Engineering

## Thank you & Questions

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