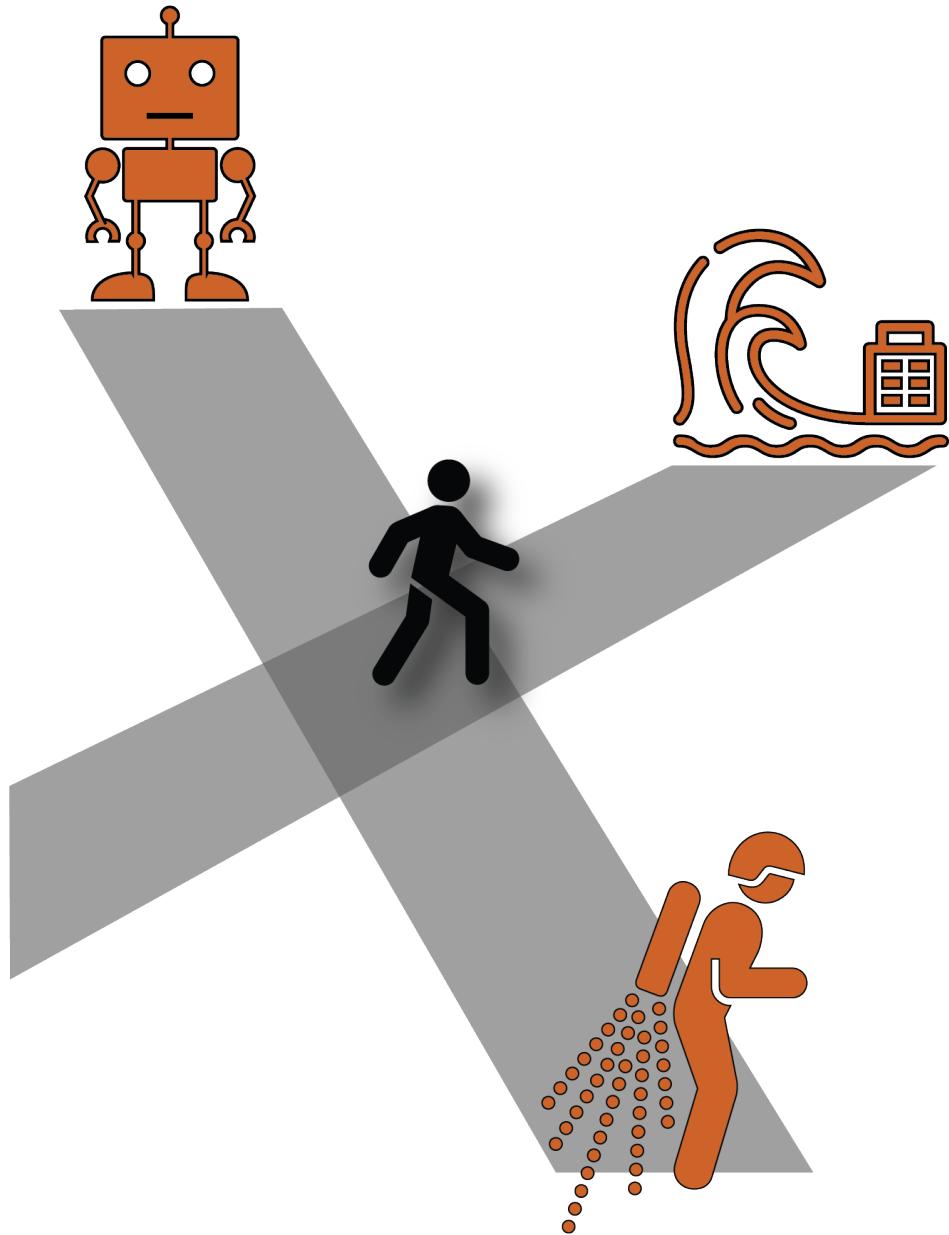


Confidently Navigate Change:

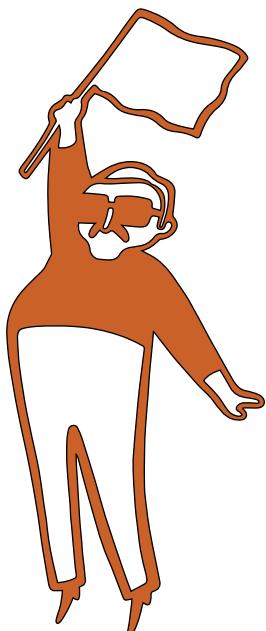
Your organization's guide to becoming more adaptive



Janae Futrell, AICP, LEED AP

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Time to Start Navigating Change

Introduction

Online Survey + 30-minute Consultation

I'm Janae Futrell, AICP, LEED AP, and I've written this guidebook to orient you on the path to helping your organization become more adaptive. Getting started is no small feat, and my hope is that you feel not only capable, but also empowered on your journey. The guide opens with a brief survey, which is also available as an online survey. After completing and **submitting the online version** you'll receive a 30-minute consultation with me at no cost. Your responses help orient me to your particular situation, so I can provide insights into how you could move forward with a more adaptive approach at your organization.

Graphics + Guidance

After the survey, the guide shifts into a "big picture" graphic to show you how all the parts fit together. It also includes "steps on the path" guidance to further describe how to get started and how take your adaptive approach to the next level. Towards the end, "next steps" are provided to help you transition from the guide to the real world and taking action. A few printable worksheets are provided to keep with you for creative exploration.

Educational Article Series for Reference

As a reference, be sure to review the **Educational Article Series: Getting Started with Real Time Planning**. It provides background on **Why is real time planning needed to navigate urban change?** as well as guidance on **A 10-point checklist for future-proofing your plan** and **How to identify tipping points and triggers**. These articles are companion resources to this guide and further illustrate some of the concepts mentioned, often noted within the guide.

How We Can Help

To find out more about how Civic Sphere can help you navigate change and become more adaptive, see details on the service area, **Real Time Planning**. We can work 1-on-1, with your work team, in-person, and virtually in order to personally help you with your journey to help your organization become more adaptive. Our services span a full range from providing hourly guidance and 1-3 day workshops to designing custom adaptive planning processes.

Contact Me Anytime

As a fellow urban planning and management professional who knows how challenging it can be to become more adaptive in a changing world, I wish you all the best on your journey and applaud you getting started. Reach out to me at **janae@civicsphere.com** to share your thoughts about how your journey is going - I'm all ears and eyes!

All the best,
Janae



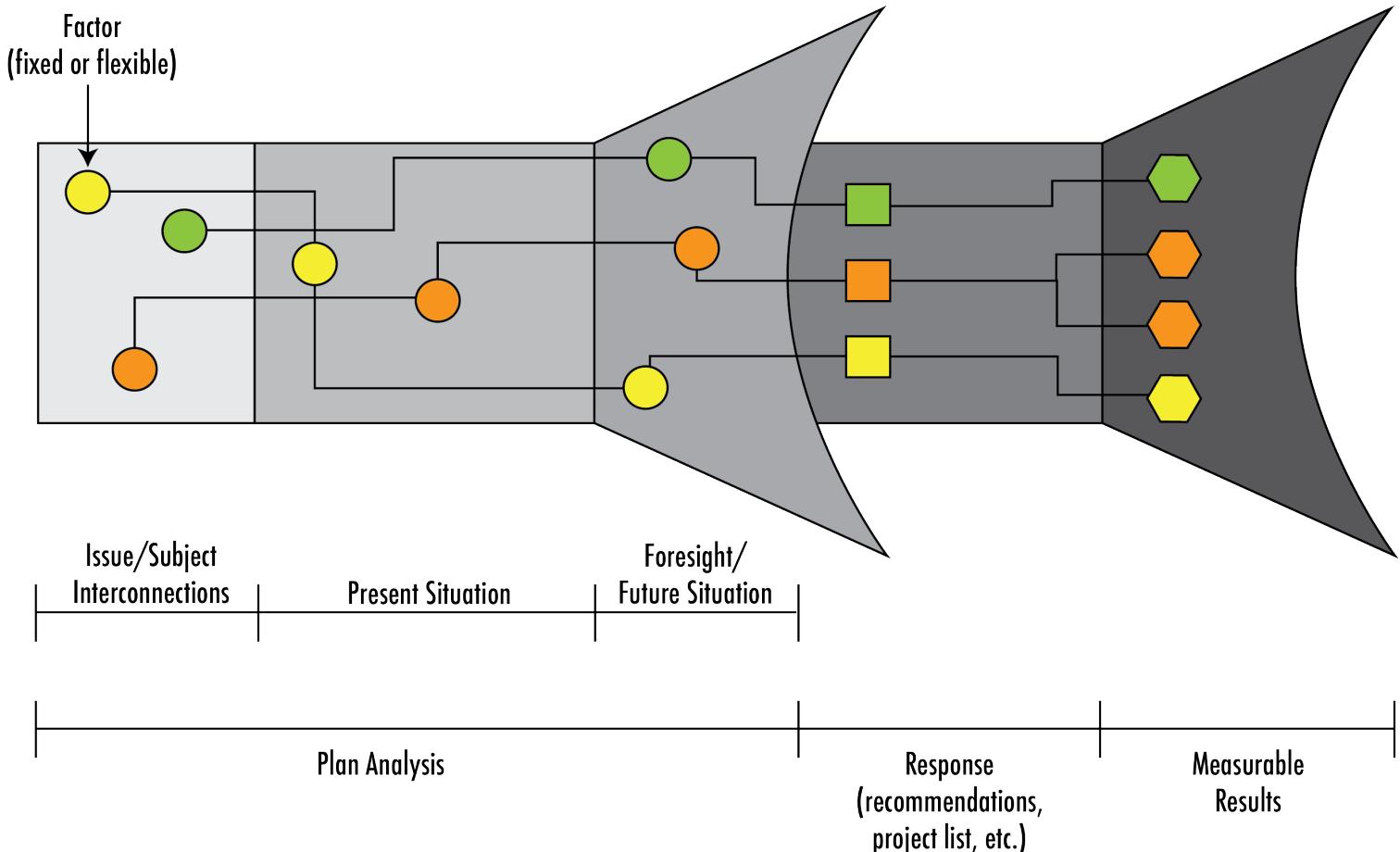
Survey

The survey below is also available as an online survey.

**After completing and submitting the online version,
you'll receive a 30-minute consultation at no cost.**

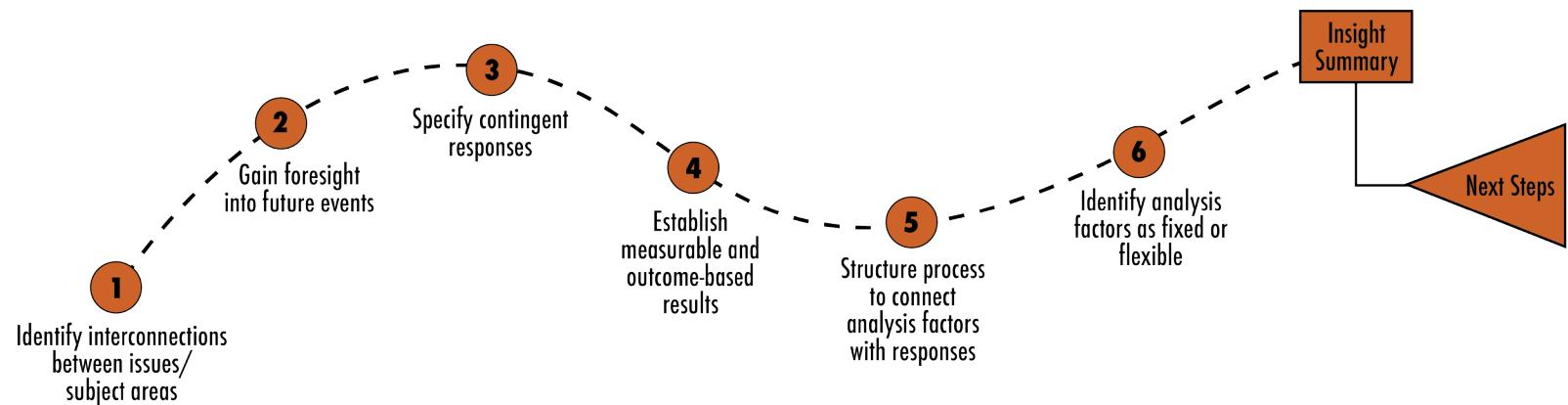
1. Does your organization have a defined, transparent structure connecting plan analysis to plan results?
 - a. If yes, please describe.
 - b. Where do you see areas for improvement?
2. Is your organization able to explicitly identify fixed and flexible factors within its planning process structure?
 - a. If yes, please describe.
 - b. Where do you see areas for improvement?
3. Does your organization put a significant amount of work into establishing foresight, such as trends analysis, forecasting, horizon scanning, and other methods, to gain insights into what the future might bring for the planning cycle?
 - a. If yes, please describe.
 - b. Where do you see areas for improvement?
4. Does your organization's planning process explicitly identify the interconnections between issues and subjects of focus?
 - a. If yes, please describe.
 - b. Where do you see areas for improvement?
5. Does your organization work towards specific measurable results and quality of life outcomes such as social equity, economic development, health, and environment to contextualize its impact in the broader urban system?
 - a. If yes, please describe.
 - b. Where do you see areas for improvement?
6. Does your organization have a clear strategy for leveraging projects as responses to different ways the future may unfold, preparing to deploy certain projects depending on possible future events?
 - a. If yes, please describe.
 - b. Where do you see areas for improvement?

Big Picture



This “big picture” graphic provides an illustration of the structure and parts of an ideal planning process. It begins, at left, with the plan analysis, comprised of the issue/subject interconnections, present situation, and foresight/future situation. It then shifts into the response, such as recommendations, project list, or other responses. On the right, the measurable results are shown. The circles throughout are factors under consideration during analysis, which are either fixed or flexible. Before you move onto the following pages, take a few moments to jot down your thoughts about how your organization structures its planning processes, in comparison with the graphic. Are there major areas that are different? Are there questions you have about the graphic, perhaps parts you think are missing? Go ahead and make note of all these thoughts, and see if they become clearer as you move through the guide. If not, revisit these thoughts and questions when you get to the “next steps” page in case follow-up actions are needed.

Steps on the Path

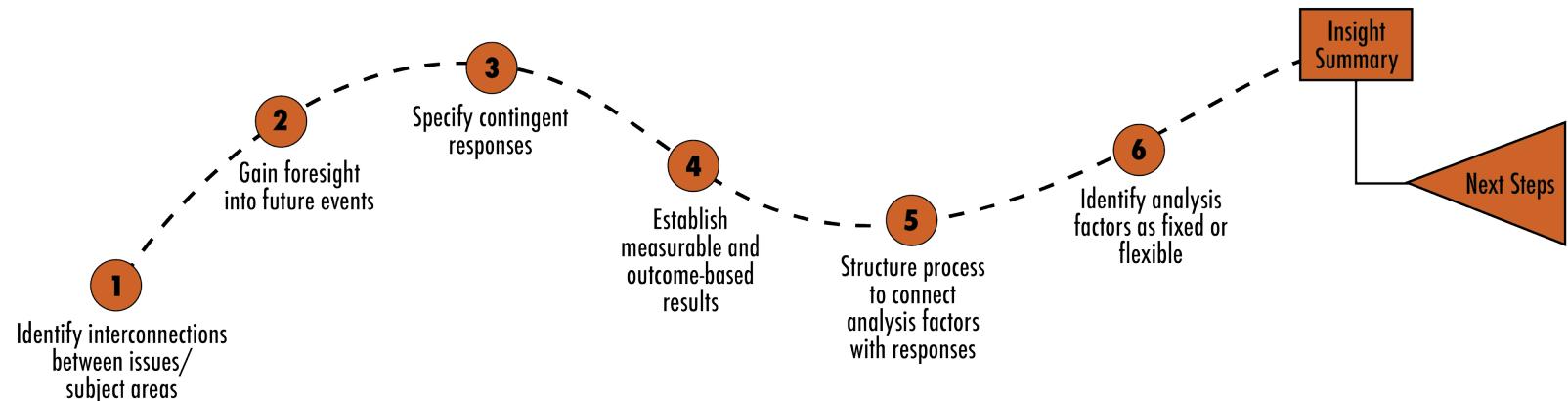


STEP 1 Identify interconnections between issues/subject areas

From A 10-point checklist for future-proofing your plan, “Plans often have goals and objectives at the beginning, and they tend to focus on a specific area of work, such as economic development or transportation. These goals and objectives are often entirely based only on writing as a medium. Early on in a plan, take an economic development plan for example, it should be made clear what issues are interconnected, and even interdependent, for the economic development issues the plan will address... Economic development often relates to housing, transportation, education, and other factors for a local area, but it is up to that area to define the interconnected issues for themselves. Then, when the goals and objectives are written, it will be clear the conceptual, and previously unstated basis, these rest upon. Many times, an economic development plan will have some mention of transportation, for instance, assuming every reader ‘gets it.’ The catch is, they don’t. The relationship between these issues should be stated for the purposes of the plan, even if it seems obvious to the creators, for the sake of transparency. See the Educational Article Series: Getting Started with 360 Degree Planning for more details.”

One way to begin identifying interconnections is to consider how the work of various departments and divisions relate to each other on a cross-functional basis. Another way involves identifying key outcomes of focus, such as economic development, equity and social progress, health and safety, and environment, and then connecting the work to these outcomes. In order to get started with the former, see How to Map for Cross-Functional Areas. For the latter, see How to Map for Outcomes. Complete the exercise(s) in the articles, and gain insights on interconnections before you move to Step 2.

Steps on the Path



STEP 2

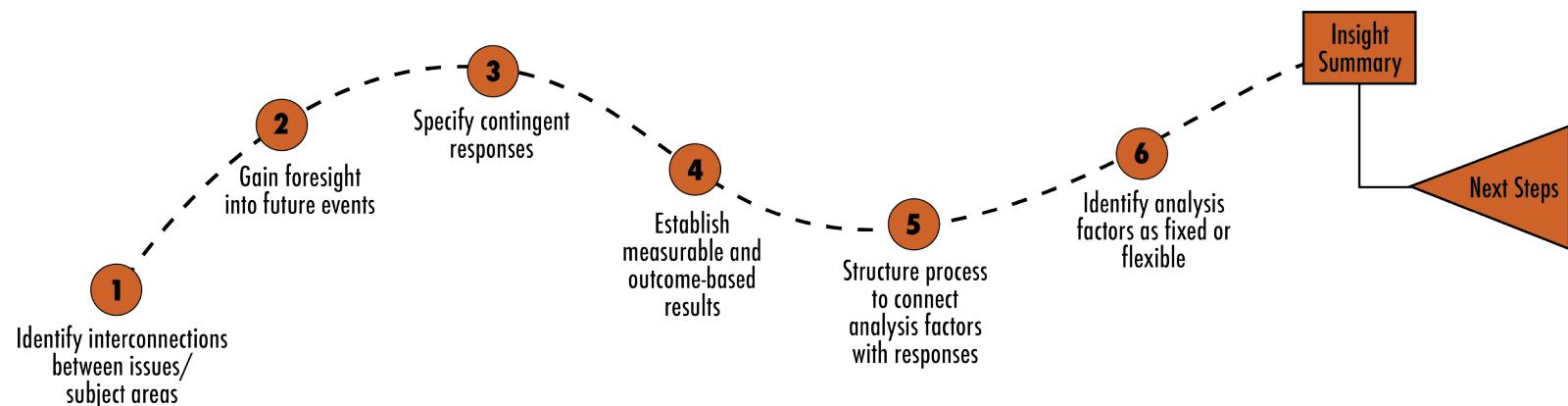
Gain foresight into future events

Every plan should have some component that looks into the future to ascertain the ways the future might take shape, in order for the plan to be responsive and adaptable to a range of future events. Foresight encompasses a wide range of methods such as trends analysis, forecasting, horizon scanning, projections, and others.

Exploratory scenario planning is one method, or technique, that is becoming more frequently used in planning practice. It involves identifying a range of "future forces of change" in categories such as technology, climate change, natural disasters, political cycles, and many others to pinpoint the types of future events that could significantly impact the area. A "scenario" is a plausible future state that is comprised of multiple future forces of change under consideration. Typically, there are three to five scenarios, but there could be more. The purpose of a scenario is two-fold. It provides an illustration of how the forces could interact and play out together, and it provides a logic about the future that enables the planned response to be contingent as needed, which will be described in further detail in Step 3.

One method for gaining foresight, or many, can be used as needed to understand the future, its unknowns, and its ambiguity in order to plan according to the ways it may unfold. Take some time to apply various foresight methods in an initial/draft way, if you are familiar with them, and create a document summarizing your findings. If you are not very familiar, or pressed for time, simply list five future forces of change you know are going to be important to consider before you move into Step 3.

Steps on the Path



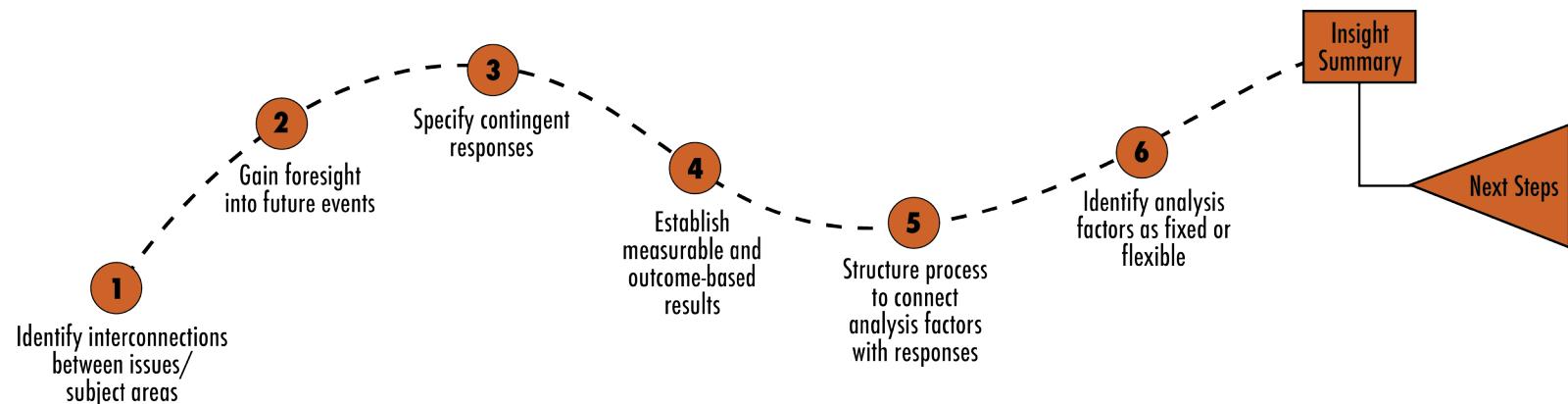
STEP 3 Specify contingent responses

Once you gain an idea of how future events might unfold, consider how your planning process responds to various events. Is the planning process currently fairly monolithic in terms of its response, meaning it has a set of responses, such as recommendations and projects, planned for implementation regardless of what happens in the coming year? Or does it allow for adaptability, responsiveness, and flexibility depending on how future events take shape? If the latter is not already in place, consider how the responses could become contingent on future events.

From [A 10-point checklist for future-proofing your plan](#), "...consider which projects are going to improve the local area no matter what the future brings. These are 'no-brainers' of sorts with obvious need and wide support. Some of the other projects may only be appropriate if certain future events come to pass. For these, think in terms of 'if-then' statements. If this certain future force of change takes this path, then we react with that (enter strategy or project here). This is essentially building in a contingency planning element that not only makes the planning process much more effective and successful, but it keeps professionals from feeling that their reactions are inadequate. The fact is, we can only do the best we can do. This type of thinking, planning, doing, and acting, given that the future remains unknowable, is the best we can do. That brings with it confidence and comfort in the knowledge of performing well as a professional. For more about 'if-then' planning, specifically how to set up 'trigger points' to help indicate when the 'if' is really happening, or how far along it is, see [How to identify tipping points and triggers](#)."

Jot down at least three responses, such as recommendations or projects, that would only be appropriate if a specific situation occurred in the future. This will form a draft contingent response list. Next, move onto Step 4.

Steps on the Path

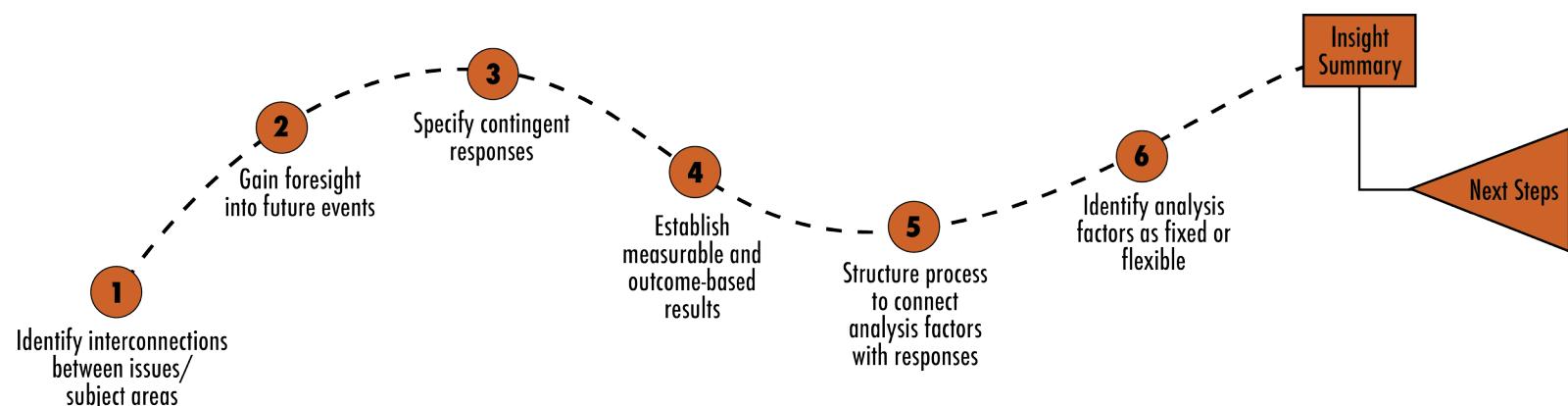


STEP 4

Establish measurable and outcome-based results

Any planning process should include a clear list of measurable results for target setting in the form of "anticipated results" and a comparison with reality over time in "proven results." This becomes even more critical for intentionally adaptive planning processes, because the "why" must be crystal clear. Otherwise, there is no orienting logic to make one decision versus another. When navigating change, unknowns, and ambiguity, establishing the measurable results as the "compass" is key. Further, it is recommended that the results be framed in terms of outcomes such as economic development, equity and social progress, health and safety, and environment in order to understand the impact the organization intends to make in the wider system through its plan. For more on outcomes as well as anticipated vs. proven results, see [How to Combine Mapping and Results for Holistic Organizations](#). Other articles in the [Educational Article Series: Getting Started with 360 Degree Planning](#) can provide insight into how to establish a set of measurable and outcome-based results. Once you have your draft list of results, move onto Step 5.

Steps on the Path



STEP 5

Structure process to connect analysis factors with responses

Within every plan, there is a response, often a set of proposed projects or series of recommendations intended to foster change and improvements in the subject(s) of focus. There is also an analysis component, containing the qualitative and quantitative research and analysis needed to formulate the response. The catch is, it is rare to have a transparent display of how a response was generated based on the analysis. Since most plans have this disconnect, "new" plans need to be generated periodically, in part because the planning situation has changed. If the analytical factors had been clearly identified and connected with the responses, then the analysis could essentially be "rerun" with the updated factors.

Plans tend to lack a logical underlying structure and are characterized by an over-reliance on text as opposed to diagrams. Each proposed response should have a diagram attached to it that connects the various analytical factors so any reader knows how the solution was generated. Take a look at your planning process and see if there is a way to identify the analytical factors under consideration. If there are responses already identified, see if it is clear how the analytical factors combined to arrive at the responses. If you think you can see it, but others could not, create a diagram of the analytical factors and the resulting response. Try and complete three of these diagrams for three different proposed responses before you move to Step 6.

STEP 6

Identify analysis factors as fixed or flexible

Let's say your plan now has a clear underlying structure with analysis factors mapped to the proposed responses. If you "rerun" the plan 2 years from now, you'll need not only the factors, but also an understanding of the degree to which they are fixed or flexible. "Fixed" means they are not subject to change, such as demographics at a time period in the past. "Flexible" means they are subject to change, such as demographic projections in the future. If you can label each factor as such, then each "analysis-response diagram" will include the additional level needed. Identify the analysis factors as fixed or flexible as your last step.

Next Steps

1

Take the insight summary you created from Steps 1-6, and compare it with how your organization currently approaches its planning process. Identify missing elements in what you currently have to pinpoint gaps. Use the printable worksheet on p.10 to help order your thoughts.

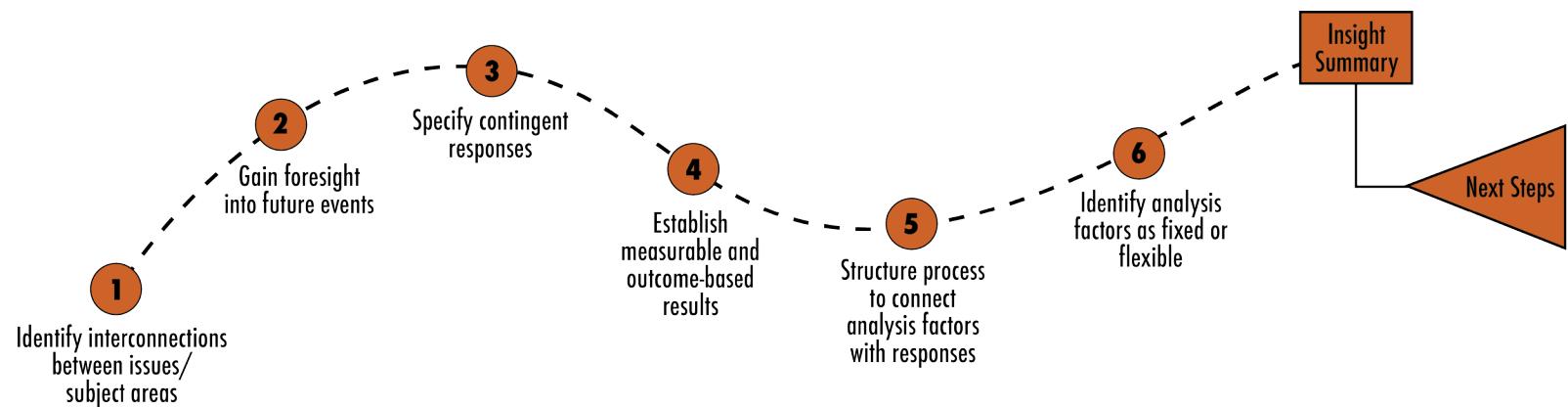
2

Take the clarity you gained from Next Step 1, and identify ways that you could foster the planning process changes needed. This will be your action items list, and you can get started making progress when you are ready. Use the printable worksheet on p.11 to help order your thoughts.

3

Pinpoint additional planning process needs that were not covered in this guidebook or in the **Educational Article Series: Getting Started with Real Time Planning**. Make sure you are clear on the items you still need in order to help your planning process become more adaptive. If you would like further advice, contact me at janae@civicsphere.com.

Printable Worksheet 1



Step 1 Gaps	
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	Step 2 Gaps
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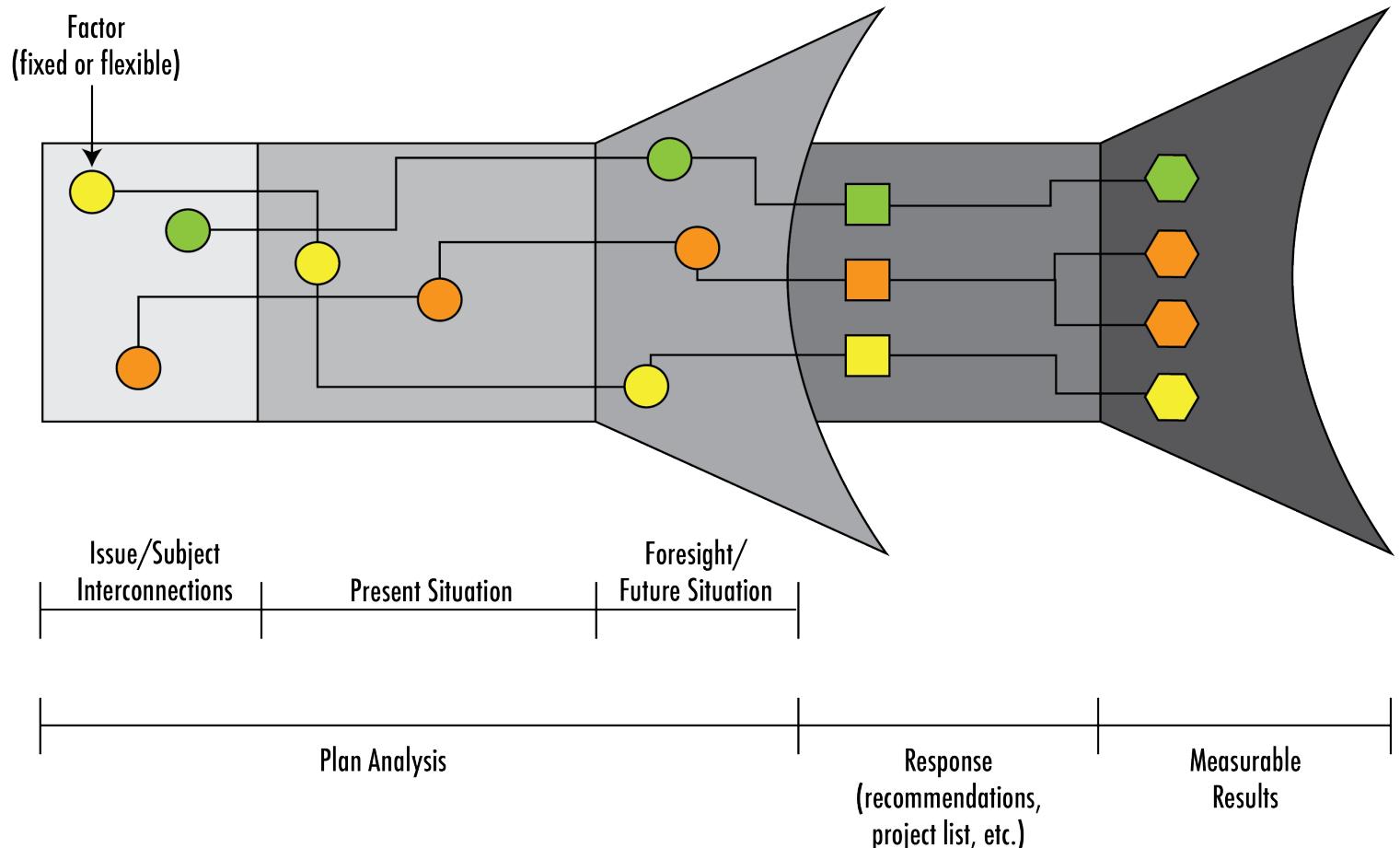
Step 3 Gaps	
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	Step 4 Gaps
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Step 5 Gaps	
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	Step 6 Gaps
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Printable Worksheet 2



Action Items for
Plan Analysis

Action Items for
Response(s)

Action Items for
Measurable Results