

# A 30,000-Foot View: Visioning Sets the Way

by **Claire Baldwin**

**C**hange is inevitable, and there's no dispute that the best way for a community to face it is to manage it through envisioning the future and preparing for it. Change, however, can arouse emotions so strong that they can derail even the most urgent planning initiatives.

In the city of Palm Bay, Florida, however, a combination of traditional scenario-planning methods and an understanding of the dynamics of group exchange and psychology resulted in a stakeholder agreement that all parties, no matter how diverse, got behind.

When people think about their future, most often they'll have a general idea of their lives over the next five years. From five to 15 years, things start to get fuzzy, and most will have no idea what they'll be doing 20 years from now in any meaningful detail. For policymakers and community leaders, however, having a long-term vision of their community's future is critical, as the decisions of today shape a community's future health, vitality, and well-being.

Visioning is a process that helps a community identify the future it desires by defining its core values and goals as well as strategies to achieve that future. The vision created through this process—a "30,000-foot overview" of what a community should be like in 10 to 20 years—becomes the foundation on which land-use laws, fiscal budgeting, and detailed strategic policies can be based. The typical process focuses on community assets rather than present needs, and it assesses future options based on shared purposes and ideals.

## PSYCHOLOGY OF ORGANIZATIONAL CHANGE

By using techniques from the field of organizational psychology that prompt the formation of group consensus, facilitators in Palm Bay witnessed a paradigm shift among public participants and the local government staff. That shift allowed for the creation of a vision that was tuned to the wishes and future needs of the community.

The psychology of organizational change is based on how groups interact with each other. Employees at a company have a ready-made stake in following the direction of senior management. They risk losing their jobs if they don't, and the pressure for conformity within the workplace is often enough to support a change process.

In a community, however, other than following the laws, nothing says its residents have to work together. Therefore, in Palm Bay, residents needed a reason to cooperate with each other face-to-face before the vision could be accepted. That meant facilitators had to create leverage, and that leverage had to be powerful enough to get individuals to consider possibilities that had nothing to do with their own plans and ideas.

## PALM BAY'S CHALLENGE

Palm Bay is on the east coast of Florida, south of Orlando. It was established by the General Development Corporation during World War II, when the American dream of a life in sunny Florida was the goal of many families. With the promise of owning "a little piece of heaven," the city's properties were often purchased sight unseen.

What the corporation did not anticipate, as it laid out plans for the community, was that the city's development would be piecemeal and slow. The downtown and community centers once envisioned never occurred, leaving Palm Bay without a defined city center. The city now lacks those connecting areas that drive other communities toward an identity that defines them and their residents.

Palm Bay has a population of 130,000, which is expected to nearly double in the next 10 to 15 years. Many in the population come from diverse backgrounds, and they are changing the city's culture as their numbers grow. Today's residents include transplanted New Yorkers, native Floridians, Midwestern families, and service industry workers all seeking appropriate housing and entertainment.

And, as with many communities in flux, there is also a vocal group of residents distressed by the change and who are perceived as anti-development. Government leaders recognize that

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having a plan in place for the city's future is critical to integrating new residents and creating "a balanced community to work, live, grow, and play." The challenge of the visioning process was to get this diverse mix of people to hear each other and get them to consider the needs of people who are yet to come.

Internet-based information and evening meetings don't necessarily allow for the full representation of different sectors of society who may not be available to participate in the traditional "Thursday night meeting" many communities host. Palm Bay held a series of workshops in different venues (the senior center, community centers, and so forth) and on weekends to enhance the opportunity for all kinds of people in the community to join in the dialogue.

City staff and such community members as local developers were also invited to attend. They can be a powerful voice in providing the foundation for the visioning process and educating attendees in the technical aspects of the vision. They also possess local expertise, a sense of the culture, and a context for the dialogue as well as validity as experts in the local experience.

## SOCIAL EXCHANGE PRINCIPLES

As people arrived at the workshops, it became obvious they had come with pet projects in mind. Some wanted paved roadways and stop signs; others wanted parkland for soccer fields or routes for all-terrain vehicles.

Dozens of personally championed community improvements were presented, and the tension between opposing factions became apparent almost from the moment people started coming through the door. The first task was to move participants away from polarizing personal goals and toward the establishment of a common reason for cooperation.

From the field of organizational psychology we know that certain social actions and norms are hard for people to resist. Theories of reciprocity, for example, tell us that a positive action by one person generally leads to another positive action in response.

Behavioral economists have shown that simply the possibility of reciprocal actions by others increases "the rate of contribution to the public good, providing evidence for the importance of reciprocity in social situations."<sup>1</sup>

To evoke such behavioral considerations by participants in public workshops, facilitators often jump-start the change process by seeking to establish common ground. This way buy-in or commitment can be evoked on a central theme that resonates with all parties. To do that, facilitators seek to get everyone in attendance to participate, so that the norm of reciprocity is set for the group at large.

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During the Palm Bay workshops, this was achieved by asking attendees who opposed growth in the city to stand in one spot and those who favored growth to stand in another. This action forced each attendee to publicly take a position. It eliminated their ability to be passive, so commitment was engaged.

Participants were then split into smaller groups, and each was asked to state in front of the others why they'd come to the workshop and what goal they'd like to achieve. Facilitators within each small group helped to keep the dialogue focused on larger goals to see whether the different groups had goals in common—such as to create a safe community for families, to keep the Florida feel, and more.

If people were in favor of economic development, the group was asked to be specific about it. Did they want factories, office buildings, or retail outlets, and, if so, where? If they were interested in bocce courts,

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would they like them in a park setting? Should the park also be big enough to accommodate bike trails and ATVs?

This way, groups that might have been on opposite ends of the continuum at the beginning could easily see the common and sound elements of proposals for change and, within that understanding, be able to begin to find a future for the community. Transforming big ideas into specific and measurable goals got the Palm Bay residents to start to see each other's ideas and to start thinking like an interconnected community with a collective and similar vision for its future.

### **THEORY OF GOAL SETTING**

Psychologists have found that if a person publicly states a goal in front of someone they value, there's a better chance of actual follow-through and goal achievement. Using this theoretical understanding after the small groups had worked out their stated goals, the facilitators announced those goals to the rest of the participants.

From the moment that statements were made to the larger group and the common elements among the goals of all groups were noted, a transformation began to occur in the room. A group of diverse individuals now had a reason to cooperate with each other. Quite logically, they all wanted a balanced Palm Bay, where all interests could be met. The facilitators finally had what is rare in a public forum—leverage.

In the morning, the community was fractured and participants were concerned that it would be too hard to find common ground. By lunch, they were sitting close to each other and talking to people outside their goal groups about possibilities and opportunities for change.

Once this transition had been achieved, the facilitators were in a position to move on to the next step—a visualization of the agreed-upon goals.

### **SCENARIO PLANNING**

Scenario planning was developed after World War II as a military effort to

## **Palm Bay Results**

Lee Feldman, city manager of Palm Bay, Florida, sees a bright future for the vision plan. He noted that, although it's less than a year old and still being integrated into the city's comprehensive plan, it's already been useful.

"We have 11 different developers representing 20,000 acres, and they are using the plan as they rezone their property," he said. "It's creating the synergy for 11 folks to come around and talk about how they'll fit together instead of 11 separate visions."

It has also been a valuable instrument for the area's regional planning council, which is integrating it with its own plan. Palm Bay covers more than 100 square miles and is one of two large cities in the region, the other being Orlando. It is important that the two plans coincide on future changes in infrastructure and regional centers.

The visioning process also helped the city government identify citizens and citizen groups they didn't know were interested in being involved in the city's future.

One unexpected benefit from the process, according to Feldman, was: "It allowed the people in the local government some self-introspection to see if we were in touch with people's thoughts and concerns. It was a validation process."

predict opponents' movements so that alternative plans could be prepared. The Royal Dutch Shell oil company used scenario-planning techniques to act proactively with respect to long-term policies through identifying critical factors that would affect the price of oil in the future. As a result of its long view, Royal Dutch Shell became the second-largest oil company in the world and number one in profitability.

When visioning is linked with scenario planning, the blending not only creates effective guidance policies for possible futures, it also allows participants to review and comprehend what those futures might mean to them five, 10, and even 20 years ahead. The facilitators in Palm Bay used geographic information system-based "future maps" and financial modeling that offered participants a view of the real-world impact of their decisions and policies on the monetary, physical, and political landscape of the city.

Scenario planning was used during the workshops to look at the major drivers that would impact Palm Bay the most, including economic de-

velopment, transportation, housing, open space and recreation, and land use.

### **REACTIONS AND RESULTS**

In one workshop, attendees were tasked with designing and planning 10 acres of new housing so people from various socioeconomic backgrounds and age demographics could find appropriate housing. Many residents had expressed a desire for such smart-growth design concepts as cluster housing with mixed uses, including retail on one level and apartments on an upper level. Although all the participants saw the value in such mixed housing projects and agreed that in theory it would be a positive design, they realized it wasn't so easy to make social theory into real estate reality.

Ultimately, one man admitted that he wouldn't live in such a neighborhood even with the design he had helped to create. He and others recognized that, although they wanted housing for seniors, singles, the general workforce, and affluent relocators, extending those concepts into

the remaining physical areas of the community through design standards and rezoning was a complex and difficult task—one that city officials face daily. Recognizing the complexity of such smart-growth design concepts, however, opened a more supported and stronger dialogue within the community about crucial changes that must occur in present-day Palm Bay in order to make the future vision successful.

In another workshop, participants brainstormed about ideas to increase the use of the local bus system. Attendees, while collectively agreeing that public transportation was both economically and environmentally preferable, once again came to the group realization that few wanted to give up the convenience of their cars. That led to a thoughtful discussion of what would cause participants and others to make an actual lifestyle change.

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A central route was suggested and a hub system of pickup and drop-off points designed that was quite different from the current bus system. By moving the dialogue from imagining others who should take the bus to the question of what would make workshop participants take the bus, attendees were able to envision a successful change in the future.


It's important to note that these issues were discussed in an atmosphere that was neither divisive nor judgmental. It was this openness to all ideas that allowed the emergence of a community vision that will do more than gather dust on the shelf. Palm Bay residents were directly involved in the planning stage, and they were empowered to direct change rather than resist it. Their support, in turn, is empowering local government to shape land-use decisions based on a vision plan that reflects the desires of the community.

The result is the creation of a sense of community and belonging. It is this sense of others and participants' obligations to others that produced a higher level of consensus than typical outreach methods achieve. Public managers know that getting a member of the public to show a personal shift in position during a public process is powerful, and it is within such shifts that the strength of a motivated and defined group is found. **PM**

<sup>1</sup>Ernst Fehr and Simon Gächter, "Fairness and Retaliation: The Economics of Reciprocity," *Journal of Economic Perspectives* 14, no. 3 (Summer 2000), 159–181.

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