Planning as the Uniting of Multiple Perspectives: Learning from the transformation of United Way of Winnipeg
Case-in-point 2010
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Abstract

Winnipeg, like other urban centres in Canada and across the world, is becoming increasingly more diverse. Communities are more complex than ever before. In order to keep up with our evolving city, governments, non-profit organizations and planners must continuously analyze and refine their techniques. United Way of Winnipeg is one non-profit organization which has done just that. In the early 1990s, after realizing societal and environmental needs were rapidly shifting, a transformational change was implemented. At one time, United Way was an organization which raised money in the community and distributed it to a variety of social service agencies. Today, although it continues to raise and allocate funds, United Way’s vision now focuses on increasing community productivity through citizen involvement. It also works collaboratively with agencies, governments and other funders to tackle specific issues which the community deems important. United Way’s work may not fall within the traditional realm of ‘planning’. However, this case study argues that since its transformational change in the 1990s, the organization’s vision is quite similar to that of various forms of post-conventional planning. United Way and post-conventional planning processes both provide service to multiple publics and contribute to the interior growth and development of people and communities. Post-conventional planning also seeks to unite multiple perspectives, just as United Way unites over 100 service organizations in Winnipeg.
Background

In 1965, United Way of Winnipeg was established to raise money in the community and distribute it to a variety of social service agencies throughout the city. Their traditional operating model was based on two elements; bringing money in through an annual fund raising campaign and investing money in the community through an allocations process. However, a lot has changed since 1965.

By the early 1990s, the needs of Winnipeg’s citizens were rapidly beginning to grow and change. United Way staff and volunteers realized that the organization would also have to change in order to continue to meet the needs of the community. They felt they required not only further operational refinement, which had been ongoing since the organization’s establishment, but also a complete transformational change. The term transformational change refers to a process which begins at the very core of an organization, radiates outward and leaves nothing untouched (Lederman and Lewis 2003). This type of change alters the way in which an organization thinks about and describes itself through its mission, vision and value statement and the way in which it communicates with its stakeholders. Implementing transformational change is similar to re-modeling an organization, complete with new operating structures designed specifically to support a new image and freshly defined goals.

United Way’s traditional operating model had many strengths. The organization positively impacted and assisted Winnipeg’s citizens and agencies for several years. However, it was the pressure of external forces, beyond the organization’s control, which warranted the need for transformational change. For example, in the early 1990s, Canadian governments were restructured, pushing the majority of responsibility for social services down to the community level. Moreover, many corporations, upon which United Way relied heavily for funding and support, reduced their capacity to invest financial and human resources in the not-for-profit sector. Their focus shifted towards the demands of the global economy rather than the needs of their local community. At this particular point in time, Winnipeg was also experiencing a significant increase in the incidence, gravity and complexity of social issues such as poverty, teen pregnancy and arson (Lederman and Lewis 2003).

All of these changes meant that the majority of local community groups and organizations were in great need of financial assistance and were struggling to keep afloat. They could not meet the growing demand for their services and United Way could not meet the growing demand for funding. Most groups were working independently. There was very little cross-communication and knowledge sharing between agencies. However, gradually,
leaders in all sectors began to realize the need for a vehicle which could bring these diverse groups together to address community issues (Lederman and Lewis 2003). Agencies, donors, businesses and governments began turning to United Way as the organization which could potentially fill this leadership role and unite these organizations.

United Way embraced the idea of filling a leadership role and began to construct a new operating model, spearheaded by a steering committee. In June 1998, this steering committee submitted a plan to the board of directors with a recommendation for a new vision. This new vision would shift United Way from a social service and social welfare perspective to a community building and civic engagement perspective (Lederman and Lewis 2003). It would gradually change United Way’s emphasis from funding agencies to funding impact through agencies. The plan was approved by the board and United Way’s transformational change began.

**Facts of the case**

Today, United Way’s operating model contains five elements. Each is directed at achieving impact in the community by doing the following:

1. Identifying community concerns and establishing collaborative goals.
2. Determining priority focus areas.
3. Developing and implementing strategies and indicators.
4. Connecting strategies with interests and ways to get involved.
5. Measuring and communicating results. Learning and improving.

Many people may not initially view United Way’s work as traditional ‘planning’. However, arguably, since undergoing its transformational change, much of United Way’s work, their operating model, staff structure and core values can be directly aligned with those of post-conventional planning and planning for multiple publics. Traditional, conventional planning, in its broadest sense, often refers to land use planning and to the exterior, physical and material growth and development of structures, institutions and organizations. According to Harvey Perloff in *Education for Planning: City, State, and Regional* (1957):

Planning involves the careful elaboration and integration of a series of projected actions to attain the desired goals. Planning thus centres on the making of decisions and scheduled effectuation of policies. It takes form in a number of closely integrated steps, from the analysis of problems, the setting of broad objectives and the survey of available resources, to the establishment of specific operating targets; and through various succeeding stages until the results can be checked against the targets established and needed adjustments proposed (Perloff 1957, p.142).

Perloff’s definition of conventional planning is only one among many. However, it basically sums up how planning has been, and in many circumstances continues to be, viewed by both citizens and professionals. This definition describes planning as a profession which is focused on technical rationality and scientific problem-
solving. There are no references to community input, citizen participation or collaboration. This illustration suggests that planning is a very detached profession, a sort of “science of society” (Sandercock 1998, p.62), but one which is missing quite an important piece - the inclusion of society.

Over the years, planning has evolved in order to respond to a changing world, just as United Way of Winnipeg has evolved to respond to a changing community. Today, although aspects of conventional planning are still valued and necessary, there are definitely various other forms of planning. John Friedmann (1996) argues for a transactive style of planning which “places an increased emphasis on interpersonal relationships and skills and attempts to bridge the gap between citizens and professionals” (p.63). Leonie Sandercock (1998) suggests that although scientific and technical ways of knowing should not be discarded, other ways of knowing a community must also be employed when planning with diverse populations. She argues for an epistemology of multiplicity for planning, consisting of at least six ways of knowing. These include: “knowing through dialogue; from experience; through gaining local knowledge of the specific and concrete; through learning to read symbolic, non-verbal evidence; through contemplation; and through action planning” (Sandercock 1998, p.76). Suzanne Cook-Greuter (2008) explores a concept of post-conventional planning which aims to realize that “social-cultural conditioning, interpretation, context and relativity of point of view are constants in meaning-making and that attention must be paid to multiple (and often incompatible) interpretations and perspectives” (Cook-Greuter 2008, p.9). Examining Friedmann, Sandercock and Cook-Greuter’s concepts, it is apparent that there are several similarities between their ideas of planning as a profession and the way in which the new United Way operates. Just as some forms of planning have shifted from a technical decision-making approach to a more community-based approach, so has United Way shifted from a “money-in, money-out” operating model to an operating model focused on impact through a community building and civic engagement perspective. United Way’s work may not fall within the traditional realm of planning, but it does appear to align with many of the defining characteristics of transactive planning, planning for multiple publics and post-conventional planning.

Outcomes

The new United Way of Winnipeg continues to allocate funding to over 100 social service organizations throughout the city. However, along with the transformational change came various additional United Way-initiated programs, such as the Youth Relations Strategy, Aboriginal Relations Strategy, Urban Exchange, Koats for Kids, Day of Caring program and GenNext, just to name a few.

United Way’s Youth Relations Strategy searches for new and creative ways to encourage young Winnipeggers to be involved in shaping the future of the city. The Aboriginal Relations Strategy builds relationships with the broader Aboriginal community in Winnipeg - and as a result, more and more Aboriginal volunteers are actively participating in United Way’s work. Urban Exchange is an on-going, two-way conversation which provides community members with the opportunity to talk about Winnipeg, what they’re concerned about, what they’re excited about and where they feel the city is headed. This open dialogue is achieved through a
The Koats for Kids program organizes the collection and distribution of winter outerwear to families throughout Winnipeg. This program is made possible through the help of volunteers and partnerships between United Way, CTV, Winnipeg Sun, 1290 CFRW, Perth’s, Winnipeg Fire Paramedic Service, Oyate Tipi Cumini Yape and AMJ Campbell Van Lines. United Way’s Day of Caring program joins volunteer groups with United Way agency partners to complete short-term projects or special events throughout the city. Lastly, GenNext encourages young business and community leaders aged 25-40 to become more involved in the community through United Way (United Way of Winnipeg 2010).

These programs are the result of United Way’s transformational change and the shift towards a more community-based approach. Moreover, these initiatives can be viewed as examples of transactive and post-conventional planning processes with multiple publics. Each program demonstrates an attempt to bridge the gap between citizens and professionals (Friedmann 1996), places importance on the sharing of knowledge and dialogue (Sandercock 1998; Cook-Greuter 2008) and eventually results in action (Sandercock 1998).

It is important to remember that change takes time. The planning profession has evolved and changed gradually over time. It is only natural that a transformational change within an organization would also take a considerable amount of time. Although United Way of Winnipeg staff members have been moving as quickly as possible, Lederman and Lewis (2003) clearly explain that, “it takes significant time to create, communicate, anchor and realize a vision that fundamentally changes an organization” (p.5). Therefore, both staff and stakeholders must be patient throughout a transformational change and not expect or demand dramatic results overnight.

Throughout this process, United Way has learned that there is a delicate balance between moving in the direction of transformational change and honoring the organization’s history, traditions and culture. Change is often positive, but past successes must not be forgotten. It is important to communicate openly with stakeholders regarding all changes. People do not always embrace the idea of change. Therefore, it is vital to maintain an open dialogue between staff and stakeholders, providing opportunities for questioning, suggestions and input. Transformational change frequently attracts new supporters. However, it is essential to foster and nurture existing relationships as well.

United Way of Winnipeg has learned that a fundamental part of undergoing this type of transformation is to not only change from within, but to also make it known to others that you have changed. This requires looking the part as well as acting the part. Therefore, over the past ten years, United Way has dedicated a significant amount of human and financial resources into creating a new, fresh image for the organization. This is evident in their vibrant, easily accessible website, colourful billboards, posters, bus signs and promotional materials.

The organization has also experienced both staff and volunteer restructuring. Staff members are now divided into four central departments: Internal Relations and Operations; Donor Relations and Resource Development; Marketing and Engagement and; Community Relations and Capacity Building. Staff members who work in the last two departments, in particular,
have several roles which could potentially fall within the realms of transactive, multiple-public and post-conventional planning. For example, within the Community Relations and Capacity Building department, there is a strong focus on accessing outcomes, change and impact within the community. Moreover, the Marketing and Engagement department focuses on actively engaging citizens and maintaining an open dialogue between the organization and community members. These are just a few examples of how United Way’s work can be aligned with various elements and forms of post-conventional planning.

Conclusion

In closing, the planning profession has changed and evolved considerably over time. Many traditional planning methods and techniques are still valued and necessary, but are now complemented by the incorporation of new concepts, such as transactive planning, planning for multiple publics and post-conventional planning. Furthermore, the evolution of planning towards a more hands-on, community-based approach is quite similar to that of the evolution of United Way, as it has moved from funding agencies to funding impact through agencies. United Way is on a trajectory of change and has evolved significantly over time, just has planning has and will continue to do, for many years to come.

Next steps

United Way is moving in a very positive direction. In order to become an even stronger organization, they will continue to bring awareness of their vision to as many community members as possible. One of the most recent awareness strategies has been to engage young professionals aged 25-40 through the GenNext program. This age demographic may or may not have the income of middle-aged professionals. However, whether they do or not, their time and support through community involvement and volunteer work is, without a doubt, invaluable.

For the purposes of this case study, a group of young professionals were asked to describe what they think of when they hear ‘United Way’ and whether or not they could speak of a connection to or involvement with the organization. The following are a few of their responses:

"I was actually at United Way's GenNext Red October event last fall. It was great! That's how I ended up volunteering with Boys and Girls Clubs of Winnipeg – and I love it!"

"I'm not exactly sure what United Way does, but I'm pretty sure they work towards implementing programs for those in need. I know they do a lot around the city – and there are United Way posters and signs everywhere."

"I donate a little bit to United Way each month. It comes directly off my pay cheque. I only donate a little bit right now, but I'm hoping to increase that over the next couple years. And you know, I think it's a really great idea, just taking it straight off the cheque. It doesn't make a huge difference to me at the end of the year, but I hope it somehow makes at least a little bit of a difference to someone else."

"We have a United Way rep at my work. They come and talk to us every couple months and encourage us to volunteer at events and with various organizations throughout the city."

"I'm a teacher in the inner city and I know United Way helps out our school a lot, every year. They are a wonderful organization and we are all very grateful for their help and support."

These are just a few of the comments we heard from young professionals throughout the city. Of course, awareness can always be increased. However, a great deal of progress has been made over the past ten years. One of United Way’s goals is to continue to increase awareness of their vision and to encourage as many people as possible, of all ages, to be involved with United Way and its agencies as we collectively work together to create opportunities for a better life for everyone.
The transformational change process has challenged United Way of Winnipeg to work differently and to do different work in order to create opportunities for a better life for everyone. In recent years, there has been increased interest in the areas of community development and community economic development, as well as a new funding framework focusing on children and youth, Aboriginal people, newcomers and those living in low income communities. These are examples of how United Way is focused on different work today compared to the past. Perhaps more importantly, however, is how United Way works differently, with an increased focus on civic engagement, collaboration and participatory processes, all of which are key planning principles.

United Way knows that it cannot do this work on its own. It requires building and fostering relationships. United Way depends on an extensive network of partners from all sectors, including business, labour, government, education, health, and community organizations in order to influence public attitudes, systems, and policy, focus on underlying causes, strengthen a stable network of services and build capacity in the community. This also includes working with residents, community leaders, advocates, academics, and specialists. It is only through ongoing communication and strong relationships that United Way is able to address the most pressing needs and priorities as identified by Winnipeggers. Though perhaps not within the traditional definition of planning, the work of today’s United Way, both in what it aims to do, as well as how it plans to do it, does fit within current planning theory and practice.

When in planning school, I was never quite certain how I fit within the planning profession. Not wanting to rule out any experience that I believed would be satisfying and rewarding after completing my course work, I first ventured into the community sector and worked at a small community arts organization. My next career step was with United Way. I knew going into both of these jobs that I was not working directly within traditional ‘planning’. However, a combination of both my personal interests and exposure to current planning theory encouraged me to venture into these peripheral zones. It is only later, upon reflection, that I have come to realize that perhaps it is not so much that I do not fit within planning but, instead, that there is a need for alternative definitions of planning to capture the new kinds of work that many planners are doing today. Though being a ‘planner’ is a profession that has certain shared principles, there is much room for flexibility regarding how these principles are practiced. Perhaps as important as identifying as a ‘planner’ is recognizing oneself as a ‘civic professional’, an individual that carries a passion, awareness, and purpose that can be applied to any occupation, endeavor, or ambition. This is something that is not necessarily learned, but that one can only recognize, nurture, and act upon.

Acknowledgements

I would like to extend my sincere gratitude to Jason Granger for his insight, knowledge and patience throughout this project. I would also like to thank Dr. Ian Wight for his guidance and endless library of resources.

References


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