



Plan Workings™

Anastássios Perdicoúlis

Professor Auxiliar, ECT, UTAD (<http://www.tasso.utad.pt>)

Senior Researcher, CITTA, FEUP (<http://www.fe.up.pt/~tasso>)

Visiting Researcher, Oxford Institute for Sustainable Development, OBU, UK

Abstract

Plan Workings™ express graphically the content of ‘action proposals’ (e.g. public and private plans, policies, and strategies) regarding the relations between concerns, objectives, action, and outcomes, and thus facilitate the preparation and verification of both their structure and content.

1 Professional value



Creating action proposals such as plans, strategy, or policy is a daunting task, accompanied by enormous responsibility. Mainstream approaches are based on ‘point-thinking’ techniques with implicitly related *indicators*, semi-organised assessments (e.g. SWOT analysis), and semi-formal strategy maps with high ambiguity (e.g. of the ‘K-N’ type). Hence, while grand efforts are being made by high-level administrators and executives, action proposals are often not *wholesome*.

The Strategy Maps™ of Systems PlanningSM express graphically the content of action proposals (e.g. plans, policies, strategies) with special care about the relations between concerns, objectives, action, and outcomes. This special care gives coherence to the action proposals, and turns them verifiable and adjustable through review and revision undertakings, respectively.

2 Workflow

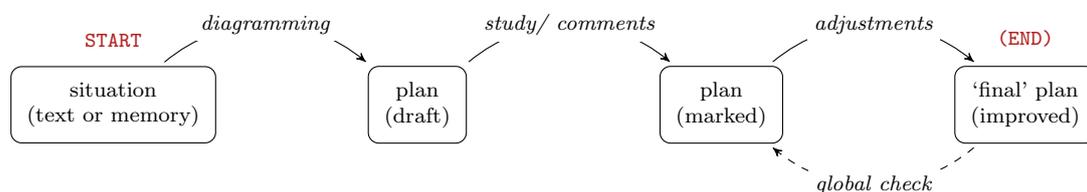


FIGURE 1 The work to be carried out over four (4) hours; a number of ‘loop’ iterations may be necessary to achieve a satisfactory plan



3 Programme

INTRODUCTION (1.5H)

- The problem in an ‘XYZ’ form (Figure 5)
- New plans; old plans (review/ revision)
- The decision model (DMA)

WORK SESSION (4H)

- Work in groups (2–4 people)
- Interactive assistance

PRESENTATION, DISCUSSION, AND CONCLUSION (2H)

- Shared experiences
- Applicability issues

4 Technical notes

METHODS^a

- Explicative causal thinking — ECT_[M] (Figure 2)
- Diagrammatic causal analysis — DCA_[M] (Figure 3)
- Decision model analysis — DCA_[M] (Figure 4)
- XYZ problem definition — XPD_[M] (Figure 5)
- Qualitative simulation — QSM_[M] (Figure 6)

TECHNIQUES^b

- Text mark-up — TMU_[T]
- Descriptive causal diagrams — DCD_[T] (Figure 5)

AUDIENCE

- *Planners, strategists, policy-makers* (private/ public sector)
- *Plan reviewers* (e.g. assessment committees, shareholders)
- *Stakeholders* (competitive/ collaborative)

COMPETENCES

- Identify and get to know the elements of plans (or strategies, or policies)
- Identify and get to know causal relationships between these elements
- Distinguish between ‘physical’ and ‘logical’ causality
- Think of the limits or boundaries/ scope of the plan
- Think of stakeholders and their positions regarding the plan
- Question the communication of a plan (e.g. volumes of text, concise diagram)

^av. Perdicoulis, 2014b

^bv. Perdicoulis, 2014a

5 Protocols

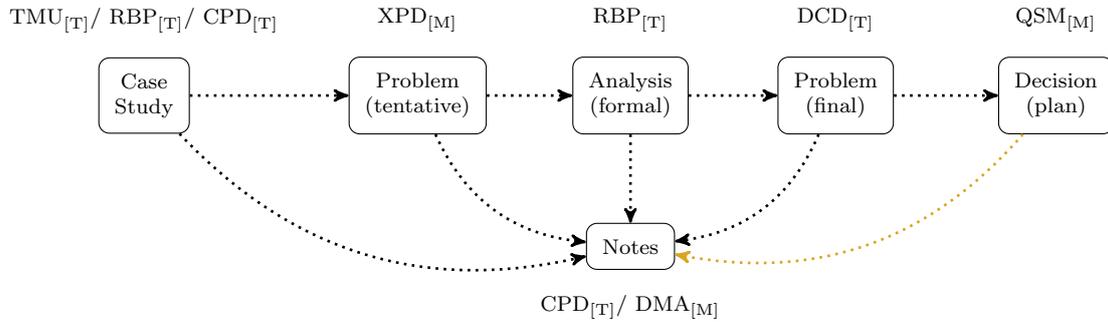


FIGURE 2 Information-flow view of the ECT method

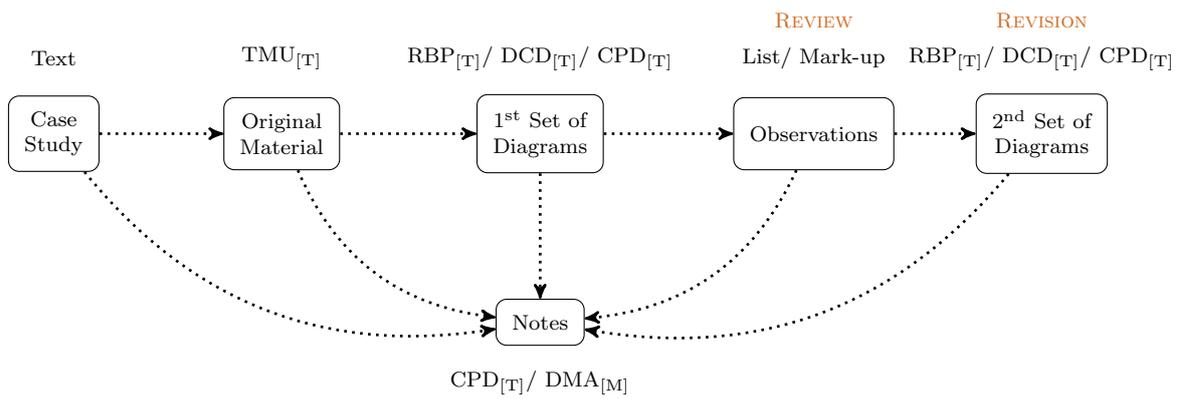


FIGURE 3 Information-flow view of the DCA method

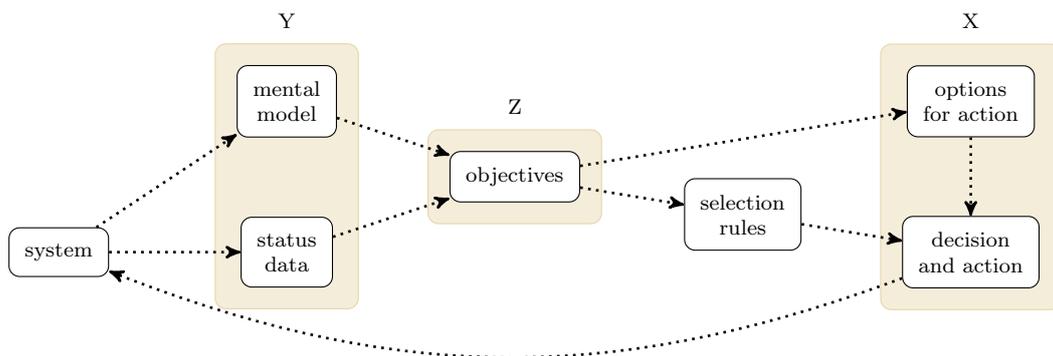


FIGURE 4 Decision Model Analysis (DMA) — systems learning model

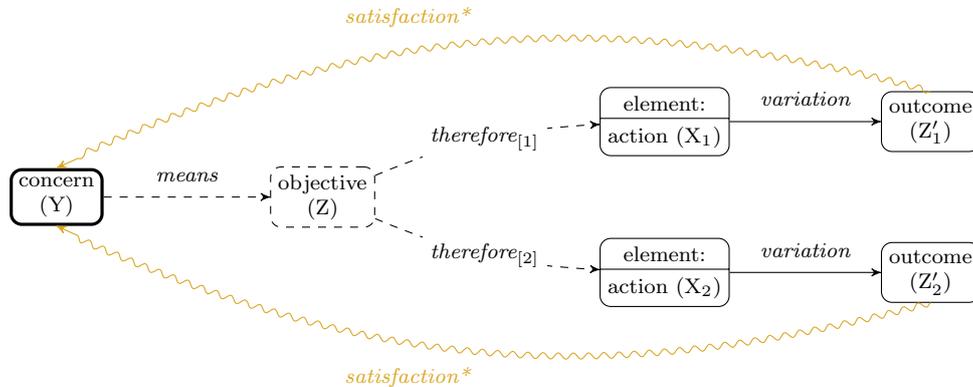


FIGURE 5 Generic Descriptive Causal Diagram (DCD); XYZ problem definition (XPD)

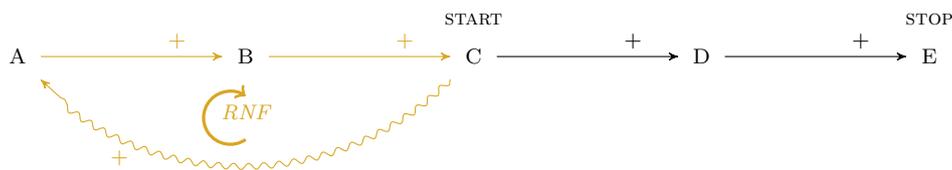


FIGURE 6 Qualitative simulation on an RBP: starting at element C will only stop at element E, but also involves a reinforcing feedback loop (marked in Gold)

6 Materials and preparation

CASE-STUDY/ WORK MATERIAL Participants are welcome to bring their own support material (e.g. stories, accounts) in (human) memory or documentation (e.g. digital or printed media).

SOFTWARE Diagramming can be carried out manually, with pencil and paper. Optionally, participants are welcome to use their own diagramming software, such as *Graphviz*, *LibreOffice Draw*, *OmniGraffle*, or *Visio*.

STENCILS

- Perdicoulis, A. (2011b) *OmniGraffle* stencil for DCD [[.graffle](#)]
- Perdicoulis, A. (2011a) *Graphviz* node-and-edge starter file [[.dot](#)]

References

- Perdicoulis, A. (2014b) *Methodology*. Perdicoulis Publishing: Folio Division, Technical Collection.
- Perdicoulis, A. (2014a) *Language*. Perdicoulis Publishing: Folio Division, Technical Collection.
- Perdicoulis, A. (2016c) Screening ‘dynamic’ documents for ambiguity. *Systems Planner*, **37**.
- Perdicoulis, A. (2016b) Developing strategy from a ‘foundation’ RBP. *Systems Planner*, **37**.
- Perdicoulis, A. (2016a) The foundation of strategy. *Systems Planner*, **37**.

Perdicoulis, A. (2013) The city as a system. *Systems Planner*, **16**.

Perdicoulis, A. (2012) System to strategy. *Systems Planner*, **11**.

Perdicoulis, A. (2011) Application Manual for 'Systems Thinking and Decision Making in Urban and Environmental Planning'. *Systems Planner*, **2**.

Perdicoulis, A. (2010) *Systems Thinking and Decision Making in Urban and Environmental Planning*, Cheltenham: Edward Elgar.

