

“You can see a lot by looking”: Planning observation exercise

Overview. Yogi Berra was a great American philosopher. Ok, his day job was baseball coach. But he is also known for many profound insights on life, often crisply delivered in one-liners such as “The past ain’t what it used to be.” Another favorite of his was “You can see an awful lot by looking,” which we take to mean that one can perceive and learn a great deal by observing something closely, not casually. This final exercise in Gateway is all about observing carefully and generating lessons for action from that observation.

You will attend a public planning event in greater Boston, carefully record fieldnotes on the event, and report on the event in a brief, well-organized informational memorandum. The assignment has **two primary objectives**:

1. To sharpen your *powers of observation*, specifically of planning events that feature a variety of interests, types of knowledge, styles of communication, and implications for action; and
2. To extend your capacity to *make connections* between important insights in planning theory and real-world events—in this case, events that are not “pre-digested” for you in readings or classroom discussion but uncovered by you through firsthand fieldwork on your own case (event).

A secondary objective of the assignment is to further develop your skills at *professional writing* for busy decision-makers.

The context. As part of a cross-national effort, the American Planning Association (APA) has launched a special task force to develop an up-to-date, critical report on how “public participation” in planning happens in the U.S., and you’ve joined an effort to observe and report on planning events in the Boston area specifically. The APA has decided to call it the “Participation in Practice” task force, to emphasize real patterns rather than idealized ones.

In many countries, activists, academics, planning consultants, and government reformers hope to make planning by government, nongovernmental organizations, and others less technocratic and less driven by insular organizational concerns. Encouraging broad stakeholder participation will be part of this, but participation can mean many different things, and particular tactics for engaging citizens, businesses, associations, or others in decisionmaking do not always deliver as promised.

Given your knowledge of planning's evolution and the key political dilemmas associated with participatory planning in particular, you have been recruited to a field research team that will attend public planning meetings and report back. See details below.

The task. You will select and attend an event, typically for a few hours, record your observations in fieldnotes, collect any materials that may be available to meeting participants (reports, flyers, proposals or plans, other), analyze your notes and these other forms of data (if any), and produce an info memo for the Task Force Chair. You will then submit your memo (detailed below) and your fieldnotes (handwritten is fine) for our review, though we will only grade the memo portion.

The background resource. See the reading for Session 24: Innes and Booher, "Reframing Public Participation: Strategies for the 21st Century" (2004).

What kind of event? The meeting you attend should engage professional and non-professional planners—not just citizen activists, say. But it need not be a government-sponsored meeting. Many nonprofits do planning and employ a variety of trained "planners," in the broad sense of the term. In general, these are the appropriate types of meetings:

- Public meetings announced by a government planning or redevelopment agency or by a more specialized agency, such as a transportation board or Metropolitan Planning Organization (MPO);
- Meetings of a planning commission, zoning board, landmarks commission, or other official planning body;
- Other public meetings, convened by government, on a policy decision or project, in a topic area that interests you;
- A planning or visioning session convened by a public or nonprofit organization, for example to create a neighborhood or regional plan or discuss an important project;
- Another kind of meeting, with permission. Please contact Prof. Briggs with subject line "Alternative planning meeting?"

Meetings that do not work well:

- Routine business meetings for government bodies, such as the Boston or Cambridge city council. These are generally not designed or run to function as planning meetings.

How should I enter? Depending on the purpose and scale of the event, you may wish to introduce yourself to the sponsors or facilitators and explain your presence and aims very transparently ("I'm a planning student at MIT, and I'm very interested in the issues here. My hope is to learn more about how

participatory planning gets done ..."). If you're a resident or otherwise a constituent of the event, adjust as you see fit ("I'm a resident of _____ and also a planning student, so I'm here to ..."). It may be helpful to introduce yourself and chat informally with meeting participants, before or after the event, to get their views. But this is not required.

You are collecting data that may include exchanges about controversial issues. At truly public events, this is not an issue, since the event itself is in the public domain (comments are understood to be "on the record"). But if you attend another kind of meeting, or if you decide to chat with some meeting participants beyond the public portion of the event, and if you are asked how your notes will be used, you should be prepared to make a clear commitment: "My observations are only for my own use and for review as part of a planning course at MIT."

What do I watch for, and what should my report address? The APA Task Force wants to get a rich sense of the range of objectives that public planning events have, how they are structured to fulfill or not fulfill those objectives, and what actually happens at the events. Toward this end, you want to make detailed observations and capture them in fieldnotes.

Here is a guide to addressing the Task Force's specific questions in the form of a **memo of no more than 1,250 words**, starting with the usual summary on top, which conveys the main ideas in the sections below it. This is a suggested structure only, meant to give you room to convey your perspective and the unique features of the event you choose. As an informational memo, your report will not include recommendations for action *by the recipient* (Task Force Chairperson), but as part of your analysis, you will offer recommendations on how the event could have been structured or managed more effectively.

The suggested word lengths are guides only, and not every event will lend itself to answering all questions below:

Summary (about 100-125 words): "This memo reports on ... I attended a meeting [or workshop or other type of event?] aimed at [indicate purpose], sponsored by [who?] ... The structure of the meeting was [analysis in brief] ... The content of the meeting featured [communication analysis in brief]. My assessment is that [implications and recommendations here]." Make every word count. This is a guide to what the Task Force wants to learn, right up top. As with a briefing, don't merely indicate the sequence of parts to come, *say something*: convey your main ideas in brief.

Event basics (about 100 words). Where was the event held and when? About how many people attended, in what roles (policymaker, staff, resident, other)? What was the setting like: configuration of the space, conduciveness to discussion or other exchange, décor or other visual stimuli, any other interesting (to you) environmental cues?

Structured participation (about 200-300 words). How was the event structured: How did it begin and end? How was the purpose presented? Who was able to speak and when? Were there formal rules of procedure or informal norms that you observed? Were information technologies, visual aids, or other media employed somehow to exchange information?

Communication analyzed (about 500-700 words). What was the tone of speech: formal or informal, enthused or dispassionate, adversarial or cooperative, all of these at distinct moments? Did the process revolve around presentation of ideas and taking questions, joint problem-solving, something else? Were different cultural “codes” or styles in play? Was there useful info in nonverbal as well verbal communication, for example in body language or facial expressions or gestures? To the extent you are able to distinguish different types of participants, how did professionals or other trained experts approach the issues, and how about the non-professionals? What features of the structure (as outlined in the section above) seemed consequential for the process?

Implications and recommendations (about 150-200 words). First, from your perspective, how *well* were the event’s objectives fulfilled, and what changes might have made the event *more* effective? And second, indicate whether your findings corroborate, challenge, or complement the arguments in the background Innes and Booher reading—and how.

Viewing samples. Several effective student memos are online, as part of this assignment [*not available on the MIT OpenCourseWare site*]. These are strong guides to what a finished memo should look like, with two important caveats: The samples responded to a longer memo assignment (up to 2000 words), and the final section of the memo connected student observations to any reading in the course, not specifically to the Innes and Booher article.

How do I format the submission? You will submit an informational memo plus your fieldnotes, as follows:

- **Address** the memo ...

TO: Chairperson, APA Task Force on Participation in Practice
THROUGH: Field Team Leader, Greater Boston Region
FROM: [Your name]
RE: Planning Observation, 11.201 Fall 2007

- **Your memo should be no more than 1250 words, double spaced.** As usual, no tiny print, please: Use an easy-to-read 12-point typeface and ample margins (at least one inch on all sides). Don’t forget to number your pages, spell check, and add the word count at the end of your memo. As with any professional memo, use clear formatting—logical subheadings, bullets, and so on—as appropriate, to make the memo rich but skim-able for the busy reader.

- **Submit your fieldnotes.** Typed is fine but not required. If you do not type up your fieldnotes, scan your handwritten notes into a PDF document. Don't forget to put your name and "11.201 Planning Observation Exercise (Fall 2007)" on top of the fieldnote document.