

Learning on the Run 31: Logistic Planning Exercise (1)

How to develop a collaborative, detailed and coordinated change-implementation plan?

The Request. The Director of a City Solid Waste Department requested help in facilitating a Union-Management Task Force. The Task Force was asked to create an implementation plan to change shift scheduling and staffing based on approved Task Force recommendations.

Larger Context. This request came as city politicians were informally discussing ways to privatize various government functions including solid waste collection, transfer and land fill operations. At the same time, there were looming budget cuts coming to each department. Solid Waste senior leadership wanted to proactively plan a more cost competitive system to promote the health of all employees and create more reliable attendance and less overtime and “sack outs” on nights.

Intervention. There were several components to a new staffing plan that the Task Force was to implement: Training for 12-hour shifts; Rotating shifts based on merit, knowledge and attendance as well as seniority; Expand work tasks to include the full scope of an operator job; Adjust rotating crew size for seasonal changes.

The task force invited selected experts (e.g., Department safety and training specialist) for their input in a half-day collaborative brainstorming and planning conference. During the conference, participants formed into groups; each group worked on a different component of the change effort. Each group brainstormed a list of events, decisions or deliverables that would be required to complete their part of the staffing change. Each group presented their brainstormed list to the entire group for input and questions; the groups then completed a Task Planning Card for each event, decision, or deliverable. All the cards were laid out on a long sheet of paper that represented a component x timeline grid. Groups checked for potential conflicts, overlaps and missing tasks. Additional task cards were added as needed. The paper grid was transformed into a PERT chart and distributed to everyone.

Last Line. Brainstorming tasks and their dependencies to create a multi-disciplinary PERT, Critical Path or Gantt chart provides a structure for maximizing input from various functional experts.

(1) Bob Bowman, HRD Manager at Simpson Timber, led this process at an initial meeting of the Planning Committee for the Organization Development Network '81 National Conference in Seattle.