

Kohl, J. and McCool, S.F. (2016) *The Future Has Other Plans: Planning Holistically to Conserve Natural and Cultural Heritage*. Golden, CO: Fulcrum Publishing.

Reviewed by Marilyn Hamilton¹

Book Review - Overview

The Future Has Other Plans has been dedicated to “heritage managers who sensed there was a better way to plan but weren’t sure how to get there.” However, it could be a very useful guide for other kinds of planning professionals who might count themselves in the private sector as developers or in the public sector as civic managers or city planners or as managers in civil society/third sector.

The authors McCool and Kohl have structured their book to give the reader a logical but satisfying path through the realities of both natural and cultural heritage projects. The authors use a mixed metaphor of a (Scharmer-style) U path down the left-hand side of an iceberg of challenges, shipwrecks and messy problems through the shift-point at the bottom of the iceberg U and up the right-hand side into the light of a new paradigm reframing practices toward an holistic/integrally-informed approach to planning.

Part 1 introduces the reader to the realities that professional conservationists face as they operate under three major worldviews: Traditional, Modern and Premodern. This part should resonate not only with the experienced project leader but may horrify the less experienced heritage change agent, as the authors share their professional and life experience from natural and cultural sites around the world. Thus, their reviews of what has been, what is and what longs-to-be is well-informed, clearly described and often keenly illustrated.

Part 2 consists of four chapters, each exploring one of the integral quadrants for the benefit of:

- the Manager’s Mind (Chapter 5)
- the Manager’s Well-Being, Behaviour and Skills (Chapter 6)
- the Collective Influences on Planning (Chapter 7)
- the Institutions that Serve Heritage Sites (Chapter 8).

These are followed by Chapter 9, that summarizes the journey just completed and lays out the Holistic Planning strategy that the authors propose addresses the many barriers explored in Part 1 by applying the learnings of Chapters 5-8.

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As noted below the structure of the book could be strengthened by making Chapter 9 into Part 3 and dividing it into 2 or 3 separate chapters. This would make the journey back to the light less overwhelming and more likely to be adopted.

The book has 2 “ends” – opening with a note of contexting from the editor and an appreciative Foreword from a valued peer, Ron van Oers, Vice Director of World Heritage Institute of Training and Research in Asia and the Pacific (under the auspices of UNESCO), and closing with an Epilogue tabling the differences between Conventional Planning and Holistic Planning.

Part 1

Part 1 gives the history of Heritage Planning that arose out of Modernism in the 1800’s with many good intentions of those who sought to manage sites of value – but as the authors see in retrospect were very much influenced by the views and values of colonialism and the scientific empirical methodologies. Starting with the unexpected sinking of the Titanic as a major illustration of the shortcomings of these approaches (and the source of their iceberg metaphor), they note the problems that arose from inappropriate methodologies that has dogged the profession all the way to the 1960’s. One of the examples they repeatedly come back to is Yellowstone National Park – whose management is still addressing the impacts of early violations to natural heritage planning (e.g. removing predators) and recent incursions of humans into its borders (e.g. with snow mobiles).

McCool and Kohl explain the original intentions and many shortcomings of Rational Comprehensive Planning (RCP) and Technical Rationality (TR) and the many sites to which it has been applied around the world – generally with the same ineffective outcomes that result from top-down methodologies, applied with shallow to no attempts at participation and frequent disrespect to local cultures and life conditions. They offer many examples of “shipwrecked plans” from World Heritage sites and observe that if they are rampant under the management of that high-profile institution, they run rampant in many other protected places.

The authors go on to bemoan that the evidence of systemic failure in heritage management that has been denied, ignored, rarely analysed and infrequently researched. Therefore, the same RCP-style processes are being repeated around the globe, without clients or funders realizing they have a track record of failure around the world. The authors take a courageous stand in pointing out this as a grievous (if not unforgivable) oversight in their profession that wastes resources, negatively impacts cultures and intended beneficiaries but keeps the profession (and professionals) funded and in business.

The authors have designed a format to add value to their narrative by creating a scheme of commentary boxes:

- Tables & Figures – to convey data, relationships, information and statistics
- Outside the Box – to show how planning could operate differently
- Toolboxes – to offer tools for effective implementation (like Mind Mapping)
- Inside the Box – to show new approaches that are working in other environments
- Fire Box – tracking the four Learning Loops

Another daring structure that the authors provide that links all 3 parts of the book is their exploration of single, double, triple and quadruple loop learning. This emphasizes their proposition that managers need to be supported by learning at all 4 levels. Further, they recognize that this developmental approach to expanding management capacity may take many years – which few funders are committed to enable. This information is deeply explanatory (and why we dive to the bottom of the U) but also deeply disturbing as the authors are not in a position to offer a solution that can readily change planning cycles that seem to be locked into one- or two-year spans. However, at the end of Chapter 9, they get close to revealing the embedded pattern of relationships that could continue to hold this stuckness or if released into the holistic paradigm release them into holistic connections. With Table 9.3 they relate and compare the qualities of the three main actors in an intervention: Heritage Community, Technical Assistance, Donor.

The authors are skilled storytellers and generally respectful academics, documenting their points with relevant literature references that support their points. They quote all the right sources from other discourses making them available to this specialized one.

I am appreciative of the range of discourses that they tapped to support their arguments – from architecture (Schon and Argyris), to systems thinking (Kuhn, Meadows, Senge, Wheatley et al), to adult learning theory (Kegan & Lahey), leadership (Ackoff), city planning (Friedman and Jacobs), to biology (Jared Diamond), to their own professions as conservationists (Pedersen). They have also drawn effectively on the Integral literature starting with Wilber, but also embracing Hochachka, McIntosh, Martineau and Brown. They bring in powerful quotations from Maalouf and reference Centers for Human Emergence Netherlands and Global – but curiously omit to include in their References Spiral Dynamics’ authors Beck and Cowan (SD) and references for Graves which are clearly implied in many aspects of their commentary (from Graves’ quotation of “allowing people to be who they are”; to rewriting quotations from Maalouf by replacing SD descriptors with “Traditional”, “Modern”, “Post-Modern”; to their recognition of the importance of life conditions that underlie Graves and SD approaches such as their discussion of conformance and performance). Other authors that I am curious that they omitted from references are Esborn-Hargens (editor of the *Journal of Integral Theory and Practice* and co-author with Zimmerman of “Integral Ecology”) – all contemporaneous with Brown whom they cite at length. These are academic niggles – but relevant to the credibility of this narrative.

The authors introduce a way to describe the worldview that is not working for heritage managers with the acronym PLUS (predictable, linear, understandable, stable). This then becomes contrasted with their proposition of a different mental model that captures the way the world really operates as DICE (dynamic, impossible to completely understand, complex, ever-changing). (The reviewer is curious why the authors did not choose the more commonly used VUCA acronym (volatile, uncertain, complex, ambiguous) which seems to capture the same qualities and thereby connect their approach to similar explorations in the discourse of other sectors?)

However, McCool and Kohl offer an incisive critique of a very widespread approach to strategic analysis, using SWOT (strengths, weaknesses, opportunities, threats). They critique the process as generally non-participatory, aimed at only short-term strategic elements with little or no consideration of emergence. Moreover, they go on to critique power dimensions and remind the reader of the contexts of power that the manager is subject to in making decisions, creating teams and implementing plans.

Even before we enter the Integral Chapters the authors make us aware that managers need to be well apprised of the importance of values because they not only impact the process of management but the outcomes of humans and non-humans (like elephants) in heritage sites. Likewise, they emphasize that learning for managers ought to be paramount, ubiquitous and continuous.

Before delving into the individual chapters focused on the Integral Quadrants, Chapter 4 offers a comprehensive and adept explanation of the key characteristics of the Integral Model including discussions of: states, stages, lines, types and quadrants. If the reader is already integrally informed, this chapter could be skipped – but for the novice to Integral discourse this chapter is invaluable and well illustrated with tables and examples. It finishes with a good explanation of Levels, drawing on Wilber, Brown and McIntosh to provide descriptions so that the manager can recognize themselves, peers, clients, funders and cultures. The chapter concludes that the “Integral Map Points Us Toward Possible Futures for Heritage Management” with the reassuring quotation from Ken Wilber that “if you study this Integral Map ... it begins to make room ... in your soul for all the parts of you that were disowned ... [and] even makes room for those who did the disowning.”

Part 2

With this encouragement, the authors then launch 4 chapters that provide a flotilla of integral lifeboats to explore a full AQAL approach to a holistic planning process.

In Chapter 5 they unabashedly support the criticality of “minding the mind”; the value of interior realities with a concise summary of “Forces that Influence Planning Implementation” from the perspective of first person “I”. Without pulling punches they cover Perceptions, values and attitudes, Beliefs knowledge and expertise, Intentions and Cognitive Capacities. While doing this they leave the “hooks” in the table for the future chapters to cover the perspectives from “It, We and Its” – which should help the reader build on their understanding and insights of the evolving Integral Model. While showing the value of the mind-based psychological approach to planning (and how and why it is so often omitted), the authors also point to the barriers caused by its omission and the triteness of glossing over vision statements created with “glued together” concepts instead of taking the time to delve deeply into discovery through authentic participation. They do not give the benefit to the intervener of swift report production and rapid project completion because they have seen that when a plan is shifted to the responsibility of the intervener it will not be supported, owned or likely succeed. Such action punishes the target project twice – once through wasting financial resources that pay such an intervener and secondly with the loss of the many resources to the community who may suffer real loss from the intervention and achieve no gain.

In Chapter 6, the authors reach back to the lessons shared from Chapter 5, and point to strategies that integrate the “I” interior perspective to the “It” exterior perspective. They point out in Toolbox 6 strategies for making training stick – identifying the importance of the learning process (and not just content), self-directed learning, prior learning, integrating new learning with past understandings, and support networks.

The reviewer was struck by the “learning by doing” modelling outlined in the chapter – characterized by this statement “every meeting we have is a sample of the future that participants

can expect to come”. The chapter values the role of skilled facilitation – but primarily the kind that leaves participants capable of managing their own plans and not becoming dependent on interveners, nor bogged down. The examples of One Sky and Hochachka’s experience in Nigeria offer enlivening models of practice that can be emulated. This chapter includes explorations of facilitation processes (that relate to Chapter 7 and could also have been discussed under the “We” banner) and allows the authors to point to the issues of power and capacity development in the hands of those who are mature versus those whose maturity makes them a danger to all.

This brings us to Chapter 7 where the topic is the Collective Mind or Culture and how they emerge from the ways we share values, ethics, visions, paradigms, mythology and legend. This chapter is full of stories that make the reader sit back and gasp (like the killing of the albino moose; how that impacted an indigenous tribe in Nova Scotia; and how difficult it is to make any restitution in such circumstances).

This chapter explores the collective methodologies that have become widely known under the “Art of Hosting” banner (not referenced by the authors – but described severally) with enthusiasm for their capacity to engage participants in meaningful ways. The authors do an excellent job in marrying the philosophical underpinnings of these approaches from collective consciousness/noosphere, to complexity science and Bohmian dialogue – showing why and how they can change the whole tenor of engagement. They also point to the impact the collective mind has on the management systems that can be built. They re-open the failings of TR and RCP and as they set out the kind of leadership, and structures of information needed, they open up into networks and communities of practice that bring the methodologies full circle back to the necessity of continuous and shared learning in community. They fire these ideas with fire itself, describing the clash of paradigms related to forest fires in natural heritage sites and the long battle to learn how Nature herself plans life in cycles. This is a very long chapter with examples coming from all 4 quadrants (on a meta level) that include Lean Practice in Manufacturing, Non-Violent Civil Disobedience, Military Debriefings and Research Networks. So, regardless of the reader’s background the examples ground the value of this quadrant in real-life practice.

The authors want to make this point decisive as the Lower Left quadrant has so often been omitted in traditional planning and RCP and TR. The chapter finishes with an appreciation of storytelling and by adding the third loop to the learning model – the one that revisions and modifies the vision.

In Chapter 8, we arrive at the final Lower Right Quadrant of Management Institutions that influence heritage sites. We look at Institutions, Policies and Technologies – set out in Table 8.1 in comparison with all the other 3 quadrants. The authors emphasize that this quadrant is generally the most familiar to the planning community because they tend to use the lenses of 3rd person science and organizations to design and intervene on heritage sites. Government agencies aka bureaucracies are critiqued for their generally Modernist operating principles (and/or Post-Modern shadows). They cite Brown’s research in reviewing eight books on sustainability to find the preponderance of Lower Right perspectives gave the narratives a very biased outlook. The authors call for innovation in this quadrant and offer strategies gleaned from the businesses who have created “safe spaces” away from the dominant gaze for innovation and experimentation. The authors argue for the value of the four “concurrent, interacting, fundamental perspectives.” The

state that such a new model would not just be “interesting ...[but] eminently practical.” They offer strategies for involving the Lower Right quadrant in balanced and interactive ways. An example is how they explore “Friends of Heritage Sites”. They suggest, “A friends group is an institutional arrangement (LR), informed by shared community values about heritage (LL), that increases a site’s capacity (UR), based on personal affinities and reinforces understanding and positive attitudes among visiting audiences (UL).” (p.217)

They take the time to explore whole new ways that plans can be formatted, suggesting they are a “means of arriving, not a destination”; that they should focus on commitments and not mere recommendations; recognize that they are collective works; that they should be offered in multiple modes from scenarios, to art, stories, videos; to non-scientific audiences (as well as scientists). Finally, they bring back their DICE acronym and herald plans that can be as flexible and imaginative as a DICE world demands. The issue of power is then re-engaged, and we are reminded that planning is about power – through decision making, agenda setting and shaping needs. But we are also pointed to the emerging power of networks that connect people, interests, plans and forces for change. They admit that their advocated approach to holistic planning redistributes power (and by doing so may create resistance amongst those who hold power before an intervention commences). But as an act of encouragement, Chapter 8 adds the fourth learning loop where the modification of core purpose and values enables a full cycle to be mapped (that, for example, in the case of forest fires is not just reconceiving policy but a whole life perspective (p. 234)).

This brings us to the last Chapter 9, and back into the light after surviving both left and right sides of the iceberg U-shaped journey. This chapter is both long and intense and would be better treated as Part 3 of the book and broken into several chapters. To get the most out of this chapter I would recommend reading it as if it were Part 3 in 2 or 3 chapters.

In their first section, they use a Kegan-Lahey table to summarize the journey from stating a goal, to identifying behaviours that counteract the goal and hidden commitments that compete with the goal. This helps them understand resistance to change and go on to identify shadows. And it sets the authors up to outline the principles of their Holistic Planning approach – one that transcends and includes both Modernism and Post-Modernism. Table 9.1 summarizes it as an AQAL Process with the 4 preceding chapters exploring the I, It, We, Its processes that care for stakeholders, trains people in their own wellbeing and health, facilitates dialogue and creates plans that recognize all 4 perspectives in institutions that operate systemically.

In the next section “Definition and Principles of Holistic Planning”, their exploration of *Holistic Planning is effectively Deep, Clear, Wide and High* (to cite Sean Esborn-Hargens). They admit it takes (significantly) more time than the older forms of planning but in taking the time up front, they contend that implementation will not only be possible but sustainable because consensus is achieved. Moreover, the authors recognize that not all leadership is the same (e.g. Traditional and Warrior styles) and each must fit the appropriate situation. This can enable traditional knowledge to complement scientific knowledge and open the door to everyone being a knowledge holder and everyone having the potential to learn. Even Technical Assistance can be recalibrated through the Integral model to support stakeholders in each quadrant to optimize performance. Borrowing from

Martineau's example that not everyone has to be integrally informed to be effective contributors, the chapter calls forth a Holistic Planning team that is:

- Multiperspectival
- Legitimate amongst constituents
- Enthusiastic and capable of implementing holistic solutions
- Include at least one champion of the protected area
- Transdisciplinary

Their guidance offers such teams detailed practices, reminiscent of Action Learning or Action Research cycles, focused on continuous learning that emerge communities of practice.

The last section of this chapter provides an Evaluation Framework by quadrant with the three main actors in an Intervention: Community, Technical Assistance, and Donor – each with a template for Indicator, Baseline and Progress. This provides a succinct method for adaptive learning.

This chapter claims the right to set out what the book has been working towards from the Introduction – namely a new way of Holistic Planning. It completes the case with Table 9.4, comparing Holistic Planning to Conventional Planning. These headings effectively summarize the whole approach and give the reader a satisfying grasp of the whole book. (This section might even be more effective if it formed the lead into Chapter 9 (or Part 3 of the book if it is re-published) because the reader receives a very clear picture of Holistic Planning as a result of the comparison.)

- Worldview
- Forms of knowing
- Dimensions of Reality
- Participants
- Power
- Planners Role
- Endgame
- Planning Frequency
- Community Involvement
- Metaphor for Planning
- Planning Investment
- Document Format.

Conclusion

Throughout *The Future Has Other Plans*, the authors seek not only to inform readers, but also inspire them by opening and closing each chapter with quotations from multicultural storytelling literature that entice and amplify the points they are making. The reviewer encountered many favourites but this example is the quintessence of what they have accomplished: “*If you want to build a ship, do not drum up people to collect wood and do not assign them tasks and work, but rather teach them to long for the endless immensity of the sea.*” (Antoine de Saint-Exupery)

The Future Has Other Plans definitely makes the reader long for Holistic Planning as the only sensible way to honour, care for and steward our valuable natural and cultural heritage. I recommend it to planners in all fields as a seminal reference for planning with an Integral Paradigm.