



A Participatory Approach to Building Public Appreciation and Management Capacity in Mt. Taishan Park, China

Summary

Mt. Taishan National Park in Tai'an, China attracts over four million visitors annually. This beautiful mountain, which is of great natural and cultural significance to the Chinese people, is also a UNESCO World Heritage site. The challenge for Mt. Taishan's municipal managers and staff was to provide a satisfying experience for visitors and maintain the mountain's beauty and cultural significance, while meeting the demands of a market economy.

The Federation of Canadian Municipalities' International Centre for Municipal Development undertook a model-project to introduce a customer-driven approach to managing Mt. Taishan National Park. The project was based on best practices developed in Canadian municipalities that operate in a market economy and that focus on meeting consumer demands.

The model-project team introduced a participatory management approach at the park, and developed a new strategy based on staff involvement, customer awareness and performance management. This fundamental change in management has led to new ways of working and managing at Mt. Taishan. Today, Mt. Taishan staff and managers are working as a team to make the needs of the customer a focal point of their strategic action plans.

In any customer-driven organization, involved and empowered staff are essential. Participatory management has become a key element in helping municipalities around the world deliver more effective services to their citizens. This approach establishes ownership and responsibility among staff, empowers staff to make decisions to respond to customer needs, builds oper-

ational networks among municipal departments, and establishes systems to make the organization more accountable to the public.

The Mt. Taishan Park Management Model-Project is one of nine model-projects of the China Integrated Municipal Development Project (CIMDP), which is managed by the Federation of Canadian Municipalities (FCM) and funded by the Canadian International Development Agency (CIDA).

Introduction

The China Integrated Municipal Development Project (CIMDP) works with municipal departments in selected Chinese municipalities to improve management, public participation and legislative development processes. This is a bilateral initiative of the International Centre for Municipal Development (ICMD) of the Federation of Canadian Municipalities (FCM), and their partner in China, the State Council Office for Restructuring the Economic Systems (SCORES). CIMDP is funded by the Canadian International Development Agency (CIDA).

The municipality of Tai'an, in Shandong Province, is home to Mt. Taishan, perhaps the most climbed mountain in the world. Mt. Taishan is a UNESCO World Heritage site and one of the most popular national parks in China. Mt. Taishan looms above the city of Tai'an, which is located 40 miles south of Jinan, the capital city of Shandong Province. The Dai Temple (at an elevation of 500 feet) in Tai'an is the starting point for the 8-kilometer hike up 6400 stone steps to the summit at 5067 feet. The mountain shelters 819 carved stone tablets and over 1000 cliff face inscriptions that attest to the pilgrimages of China's emperors over the last 2000 years. Numerous temples

are located on the mountain, and records show that the oldest was built in 351 BC. More than four million visitors a year come to Mt. Taishan, and at the peak of the tourist season, the trails and stairways are crowded.

As China moves from a planned economy to a market economy, tourists are looking for real value for the money they spend on vacations, and tourism managers are quickly learning the value of customer service. The Taishan Scenic Spots Management Committee (TSSMC) was keenly aware of the importance of increasing customer satisfaction, and building their municipal performance and management capacity.

The goal of the project was to enhance the public management capacity of the municipality of Tai'an while increasing public appreciation of Mt. Taishan as a world-class cultural and natural heritage site. The Model-Project Team included representatives from the State Council Office for Restructuring the Economic Systems (SCORES), the Federation of Canadian Municipalities (FCM), the City of Calgary, and the Taishan Scenic Spots Management Committee (TSSMC) which included representatives from more than 26 departments (such as the Administration Office, Ticket Department, Taishan Management Committee, Security Bureau, Propaganda Department, etc.).

The Process

Joint Team Approach

The Mt. Taishan Model-Project used a joint Sino-Canadian team approach throughout the project. Leaders or process champions were chosen for each international team and the various sub-teams, which included the Lead Team, Interpretative Information Management Team, the Customer Service Team, and other working teams.¹

Together, the team leaders reviewed and approved the action plans and process framework as the project progressed. Each team was responsible for keeping to the schedule established for each mission, and for budgeting resources such as training, consulting assistance and materials. The joint team approach strengthened commitment and insured that work was assigned appropriately and that the objectives were met.



Customer Service Stations located along mountain trails to assist visitors.

¹ At the project conclusion two permanent committees were established to continue the work (the Taishan Management Committee and Taishan Customer Service Management Committee); and three departments were permanently established (the Investigation and Survey Department, the Comprehensive Management Office, and the Education and Training division).

International Project Framework

FCM's International Centre for Municipal Development (ICMD) developed a four-phase project methodology that guided the project and provided a framework for achieving results. Each project phase (or mission) resulted in concrete deliverables that lay the foundation for the next phase. The four project phases were Project Definition; Knowledge Building; Capacity Building; and Application, Testing and Dissemination.

Project Definition and Planning – Getting the Project on Track

The Mt. Taishan Model-Project began in September 1999 with a joint Sino-Canadian mission in Tai'an. It was apparent from the outset that the Chinese senior managers wanted to resolve numerous issues, and that the Canadian team had neither the resources nor the time to meet all of the needs within the 18-month project schedule. In an innovative Issues Assessment Workshop, 20 Mt. Taishan senior managers explored a broad range of internal and external management issues in a general framework of management, operations, environment, community, legislation, and socio-economic trends. They generated a long list that they eventually narrowed to 14 priority issues. The managers passed these issues through a series of decision screens to assess a variety of factors such as relevant expertise, political versus management concerns, and Canadian benchmarks. The result of this definition exercise was the identification of two interrelated issues that became the overall goal of the project:

“To improve the public management capacity of the Tai'an municipality while increasing the public appreciation of Mt. Taishan as a national cultural and natural heritage site.”

Knowledge Building - Teaching, Exploring and Learning

In October 1999 the joint Sino-Canadian team conducted a Knowledge Building Mission in Canada. During the mission the team applied relevant management principles to the project goal statement. They learned about customer service strategies and other “world class” park information processes in a series of activities in Banff, Calgary, and at the Royal Tyrell Museum. They explored the processes of visitor management, setting appropriate capacity limits for visitor attendance in each area of the mountain, interpretive planning and implementation, and training protocols. The lessons learned were captured in a “best practice” manual.

This approach was a success – it allowed the team to remain focused on the overall goal while maximizing the learning opportunities. The mission culminated in a full-day session in which the Chinese and Canadian participants shared their visions for the future and developed a project action plan. They decided to concentrate first on one area of the mountain, with the expectation that the experiences and management changes would be transferred to the other areas of the mountain in the future.

Capacity Building – Making It Happen

In the capacity building phase, the model-project team members worked both individually and as a joint team. In June 2000 the entire team reconvened in China.

Before the mission, the Customer Service Team designed and administered a customer satisfaction survey and an employee survey to collect baseline data. They also began working on a customer service manual, job descriptions and performance measures. The Interpretive Information Management Team developed a framework and standards for interpretive and information signage, and determined the principal story lines.



Installation of orientation and interpretation signage assists visitors as they climb Mt. Taishan

When the Canadian team, including specialists in interpretive design and customer service, returned to China, everyone was ready for an intensive two-week work session. During the mission, the Customer Service Team finalized the customer service strategy and training manual, and trained a core group of trainers. The Interpretive Information Management Team refined their design standards, established a consistency in presentation, and planned the expression of the interpretive story. With the plans in place, the Chinese team was ready to implement the pilot project.

Application, Testing and Dissemination

During the application phase of the project, the Customer Service Team trained and tested over 100 employees. The training manual is now being used to train all personnel at Mt. Taishan. All of the strategic elements of the customer service program – a vision statement, customer service teams, service standards, skills training, awards and recognition, and customer feedback – are now in place.

The Interpretive Information Management Team completed the initial phase of the interpretive signage program for the park. The Canadian team assisted in the development of feedback mechanisms, and the joint team established a five-year monitoring program that involves customer surveys, employee surveys, strategic plan reviews and performance audits. A balanced scorecard approach will ensure that community, customer, employee and financial performance indicators are considered equally in evaluating future progress.

In order to share their learning experience, the Tai'an team hosted a regional workshop in November 2000. They invited administrators of other scenic spots to see the changes the project had generated at Mt. Taishan, and to share new management approaches with their peers. In October 2001, Mt. Taishan hosted a follow-up workshop for more than 200 participants who represented seven State Council Bureaus and eight municipalities of renowned park sites.

Results

The new focus on the customer has brought significant changes to Mt. Taishan. Management and staff are finding new ways to respond to customer expectations, and new ways of delivering services. In the process they are also seeing the benefits of this approach – for both their customers and themselves.

Customer-Driven Action

Visitor orientation signs are now provided at all major entrances to the mountain. The newly installed directional signage and wayside interpretative signage clearly identify routes and provide information about the cultural background and natural setting of the park, which increases the visitor's understanding of the cultural and natural values of the park. Also, as a result of the management team's response to the initial customer satisfaction survey, there are new and upgraded toilet facilities for visitors. Mt. Taishan's Customer Service Standards are clearly posted and emphasize the organization's responsibility to serve the visitor.

Making Customer Focus Sustainable

Mt. Taishan managers realized that if they wanted the staff to treat customers differently, they had to listen to staff suggestions, and the employees realized they needed to listen to the customers and make suggestions. The employee survey was a valuable step in this process. The Chinese team members appreciated the support of senior staff and were very pleased to demonstrate the training manuals they had produced and to share the successes of staff in improving customer service.

The Chinese team members began to see customer service as a process. For example, they conducted a customer survey, made some changes to respond to customer issues, and saw a 40% increase in customer satisfaction. The Customer Service Office intends to continue surveying customers and implementing action plans based upon the feedback.

Participatory Management Approach

In a country accustomed to a planned economy, making the types of management changes required for a market economy is a major undertaking. The Canadian team members demonstrated participatory management approaches and helped to create a learning environment. The project's participatory methodology helped to build trust and respect between team members. Working in cross-cultural teams, they reviewed each other's work and integrated suggestions and learning from both cultures in each phase of the project. Between phases, they reviewed the results they had achieved and planned for the next phase.

In the course of the project, the joint team made significant accomplishments. These included:

- The creation of a strategic framework to set the stage for management change to a customer driven organization and a stepping stone to "Total Quality Service" and "continuous improvement".
- The development of a series of tools to support the new focus on the customer – these included job descriptions to reflect customer focus, a performance management system based on customer satisfaction, and evaluation techniques to monitor the organization and individual contributions to becoming a customer-driven organization.
- The development of the concepts and organizational context to make customer service a sustainable effort, and the establishment of a Customer Service Office and a Customer Service Team to make the intervention sustainable.
- Physical changes in signage that provided quick, visible signs of success and provided the momentum for more changes.



New signage highlights historic and educational information for visitors.

Learning

The Mt. Taishan Model-Project has been a learning experience for everyone involved and has resulted in some lessons that can help inform future projects that involve cross-cultural teams in China and elsewhere.

It is critical to have people who can 'make it happen' involved in the project. These are people who understand the context and have the authority to remove roadblocks and resolve differences.

Planning for documentation and translation is part of good planning. Documentation exchanged between visits is a critical element in a cross-cultural project. In order to optimize the time the team members spent together during missions, the participants needed time to digest and reflect on documents that were exchanged, and time to conduct research and plan for the next visit. In most cross-cultural projects, good translation is essential, especially when concepts are being translated (e.g. strategic framework and customer service). Project communications can be delayed by translation time, and it is important to plan adequate time for this – about twice the time required for normal communication. Information technology can also help to bridge the gaps. In this project, Chinese team members were very adept at researching and communicating through the Internet. This saved time and effort in translation and document transfers.

Scope the project and then stick to it. In this model-project, the scoping exercise was a great success. It not only helped to get the project off the ground, but it became an important element in keeping it on track.

It is easier to articulate sensitive issues when they are put in a context that is shared by all participants. Initially, the Canadian consultants thought it would be difficult to get the real issues on the table. The Canadian consultants solved this problem by first sharing issues that were emerging in Calgary. This helped the Chinese participants to see their own issues in a broader municipal perspective, and they were more comfortable in identifying and sharing issues that were emerging in China.

Shifting learning methods requires creativity. The learning methodologies in China and Canada are very different: The Chinese education system is based upon learning by rote; the Canadian approach was oriented towards western adult education learning principles, which are more experiential. (The participants called this “democratic and creative”.) The Canadian consultant created a context for adult learning by inviting the group to become active participants – to practice their learning through exercises, case studies, role-playing and sharing experiences. This was a critical element in the success of the project.

Women in the workforce share common issues. As the project evolved, it became apparent that both the Chinese and Canadian women involved were eager to exchange views about the cultural aspects of women in the workforce. The Canadian consultants arranged an evening Professional Women’s Network meeting as an opportunity to exchange views. The event was well attended (beyond those involved in the project), created a great deal of interest, and deepened understanding of the issues facing women at work.

Products can be transplanted across cultures more easily than concepts. It is relatively easy to demonstrate a product and its use in a different culture. In this model-project, for example, it was possible to demonstrate the layout and materials for new signage, and for people to discuss their application. A concept, however, is much more difficult to transplant. In this project, for example, the concept of empowering frontline staff had implications for the role of the supervisor. (If the frontline worker makes decisions concerning customer service, what is the supervisor’s work? Why does senior management need to change? Don’t they just give the orders to be followed?) Transferring a concept requires time and patience, and opportunities for participants to apply or practice the concept.

Take advantage of opportunities to share your message. Not everything in a project can be planned, and it is good to be flexible and ready to take advantage of opportunities that arise. In this model-project, for example, the model-project team spread the news about the project to the Taishan community through a TV news broadcast, and the Canadian team members provided input on the concept of customer service to an audience of over 200 management and staff of Mt. Taishan.

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