



**Ontario
Professional
Planners
Institute**

OPPI Public Affairs Strategy Framework

June 2018



Introduction

The Ontario Professional Planners Institute (OPPI) is a not-for-profit corporation registered in Ontario. OPPI has the mandate to grant the Registered Professional Planner (RPP) designation, govern the rights and responsibilities of its members, and set academic, experience and examination requirements for membership. OPPI is currently pursuing legislative change to enable regulation of the planning profession.

Over 4,000 professional planners and over 500 students are members of OPPI. They work for government, private industry, community agencies and academic institutions and on a range of planning aspects -- land use, transportation, housing, health services, economic development, environment, energy, agriculture and food systems, emergency/disaster recovery, heritage preservation, urban design, parks and recreation, urban design, and more.

Representing the profession, OPPI also exercises leadership on planning issues. Public affairs has been an important area of OPPI's work. Over the last 20 years, OPPI has sought to influence the planning system in Ontario by actively monitoring and responding to government legislation and regulation in a variety of planning-related areas, urban, rural, environment, natural resources, etc. Since the year 2000, the organization has produced almost 150 outputs be they policy innovation or public policy responses.

Renewing Public Affairs in a Dynamic Planning Environment

Through the INSPIRE OPPI Strategic Plan process, Council learned of a range of prominent issues impacting professional practice. These included the impact of climate change, renewable energy, population and demographic shifts, technology, big data, artificial intelligence, global economic trends, and more. Planning at every level of the system and in every sphere is affected. The challenges planners face in these matters brought into question OPPI's traditional focus in public affairs.

In November 2017, OPPI's Council determined that OPPI's policy and public affairs approach should be reviewed with the goal to develop an approach to make a greater impact -- further advancing OPPI's vision to create and manage change in the built, natural and social environments for the common good. Public affairs is, in fact, the day-to-day focus of most members. As integrators and visionaries, professional planners facilitate, collaborate and work in the space between diverse policy, practice and stakeholders.

The following sets out a strategy framework for public affairs going forward. It reflects OPPI's mission and the [INSPIRE OPPI Strategic Plan 2020](#) and takes into account what was heard in the environmental scan of the strategic planning process.

This project was overseen by a Public Affairs Strategy Review Team (made up of Council and committee members) and the strategy was formulated with input from the Planning Issues Strategy Group, the Planning Knowledge Exchange Group, District Leaders, Council, staff, and a cross-section of members of the planning community. A draft version of the framework was circulated to those consulted. Twenty-five individuals responded. Their feedback was incorporated into the current version.

OPPI's Public Affairs Strategy

Public affairs refers to the building and development of relations between an organization and politicians, governments and other decision-makers. In OPPI's context, it relates to public affairs

at both the member and organizational levels. As professional planners, OPPI's members facilitate, collaborate and work in the public affairs space. OPPI speaks for the community of professional planners on public affairs issues.

The INSPIRE OPPI Strategic Plan 2020 states this vision as a cornerstone commitment: *"With foresight, leadership and professionalism, Registered Professional Planners create and manage change in the built, natural and social environments for the common good."*

To further this vision, it is set out that OPPI's public affairs approach going forward will be along three dimensions:

- A. Leadership on "Mega Issues"**
- B. Response to Current and Emerging Legislation and Policy**
- C. Ongoing Support to Knowledge Development, Exchange and Learning**

These areas are not mutually exclusive but have different orientations. OPPI will determine for any issue its priority and relevance to the work and practice of a professional planner. The strategy is set out in a framework that describes the process and criteria for such decision-making.

A. Leadership on "Mega Issues"

"Mega issues" include those trends that impact and transcend all jurisdictions and which require new learning and novel responses. They include issues such as climate change, population and demographic shifts, technology and big data, planning for renewable and low-carbon energy, and so on.

- For these issues, OPPI recognizes the professional planning community requires future-forward planning guidance...solutions, tools and other outputs useful to a planners' work and sphere of influence.
- OPPI will proactively identify key "mega issue" themes upon which to focus -- during strategic planning and, on an ongoing basis. Methods include members' feedback at conferences, district meetings, communities of interest, through member surveys, on the knowledge exchange forum, and in specially convened groups. In addition, OPPI will scan the media, related professionals' publications and events, and communications from target influencers, among others.
- "Mega issue" themes, their number and nature, may vary from year to year and according to the depth and continuity of issues. By definition, the topics will have multiple elements that impact, and are being impacted by, each other.
- Selected "mega issues" will be the focus of communications, continuing professional learning, knowledge search, and partnerships with accredited planning programs, researchers and other organizations. These issues will be viewed through the lenses of planning professionals in the various areas in which they work – for a holistic perspective. Members will be encouraged to develop learning and exchange on these topics at events and to advance these issues in their relationships externally with

decision-makers and stakeholders. Communications will be a strong support to OPPI's leadership on these issues.

B. Response to Current and Emerging Legislation and Policy

OPPI will continue to monitor current and emerging legislation and policy and respond. However, OPPI's approach will be different than in the past. Historically, OPPI's representations of the views of the community of planners on an issue have often resulted in "watered-down" and overly general statements. Without actual debate and consensus-making in the context of the circumstance of the issue, opinions vary. Statements from OPPI have not been as impactful as hoped. Rather, there will be this determination and approach:

Where to "plant a flag"

OPPI's primary responsibility is to the integrity of the planning profession and the protection of the role of the planner in serving the public interest. OPPI will take a position on planning and development issues *if* such issues or legislation directly impact the profession and the ability of the professional planner to enact their professional role. That is, OPPI will be alert to what furthers/enhances or impairs/threatens the professional obligation of the RPP to apply the theories and techniques of planning to inform and structure debate, facilitate communication, foster understanding and continue to act in the public interest.

- Where there is proposed or actual legislation and policy affecting the integrity and of the professional execution of the role of Registered Professional Planner, OPPI will speak out in order to safeguard professional practice and advance the profession.

Other planning and development issues

Regarding a range of issues that face Ontario and on which OPPI is asked to comment, OPPI's approach will not be to develop a consensus position of planners.

- On these issues, OPPI will encourage an integrity of process, public and stakeholder engagement, informed exchange and reasoned decision-making in the public interest. Through tapping its members, OPPI will provide useful considerations and perspectives. OPPI will speak to the long-term perspective and accountability of those whose job it is to weigh many inputs and decide.
- OPPI will:
 - Position the expertise of planners in their role as integrators, thereby building awareness of the planner's role and the RPP brand.
 - Equip professional planners with briefings and key information on an issue framed at the level of their influence to educate and inform decision-makers and relevant stakeholders (e.g. key questions, top points and guidance in presentation of an issue).
 - Through communications, promote vigorous, serious and respectful dialogue and diligence and the value of professional planning to policy-makers, related

professions, legislators and the wider public, educating and informing them on the issue...without taking a stance.

OPPI's participation in these issues will depend on its organizational capacity, the availability of planners with expertise on the issue, the level of public interest in the matter, current trends, and the relevance of the issue to the planning profession. OPPI will apply flexibility and judgement in making these decisions.

The above especially relates to the strategic directions of OPPI to "Promote and safeguard professionalism," and "Build RPP as the recognized brand to planners, decision-makers and key stakeholders."

C. Ongoing Support to Knowledge Development, Exchange and Learning

Exchange of knowledge

OPPI will provide an online forum for exchange and idea incubation on opportunities, issues and problematic situations facing planners. These may be individual member-driven topics as in "does anyone have guidelines for X? Or have you faced this situation?" or emerging from a community-of-interest eager to develop a body of knowledge on the matter. While this is membership co-creation, and thus dependent on members to contribute, OPPI will strive to make it easy for members to participate. Technology and collaboration tools are likely to play a role here.

- Members can share their successes, challenges, issues, reflections, and ideas as well as best practices, information, tools and resources regarding various public affairs topics that interest them. This entails creating an organized, open and welcoming environment for online sharing and dialogue across the profession.
- For priority topics -- especially the "mega issues" and trending public affairs matters -- OPPI will call for knowledge exchange and encourage content (member resources, insight, tools, useful links, and so on) to be actively shared through the forum.
- The forum will be reviewed regularly and harvested for "what is trending as a concern for planners? Where do they need guidance and support?" This will be a part of OPPI's "scanning" activities. On a practical ongoing basis, matters may be escalated for more attention and action:
 - Consideration as an emerging priority "mega issue"
 - Creation of learning opportunities with members who have demonstrated expertise
 - Recommendations to the accredited planning programs and their academic colleagues of possible research gaps ("hot topics")
 - Media relations on an issue
 - Public policy input with evidence of "what planners are saying and experiencing"
 - Communications to members and partners

Promoting the Development of Planning Knowledge and Research

Professional planners connect available evidence to decision-making. With evidence, planners can help policymakers and legislators make better decisions. OPPI will:

- Strive to foster an environment where members share links to relevant research and developments nationally and internationally and/or enable access for members to other organizations who are doing research in an area, so planners can deploy this information.
- Work with the recognized accredited planning programs in universities across Ontario to encourage relevant research.
- Possibly link researchers in an area of interest – especially on the topics of the mega-issues.

Learning Strategy

OPPI is well positioned to identify new topics and promising practices and solutions and turn these into learning events and educational programs.

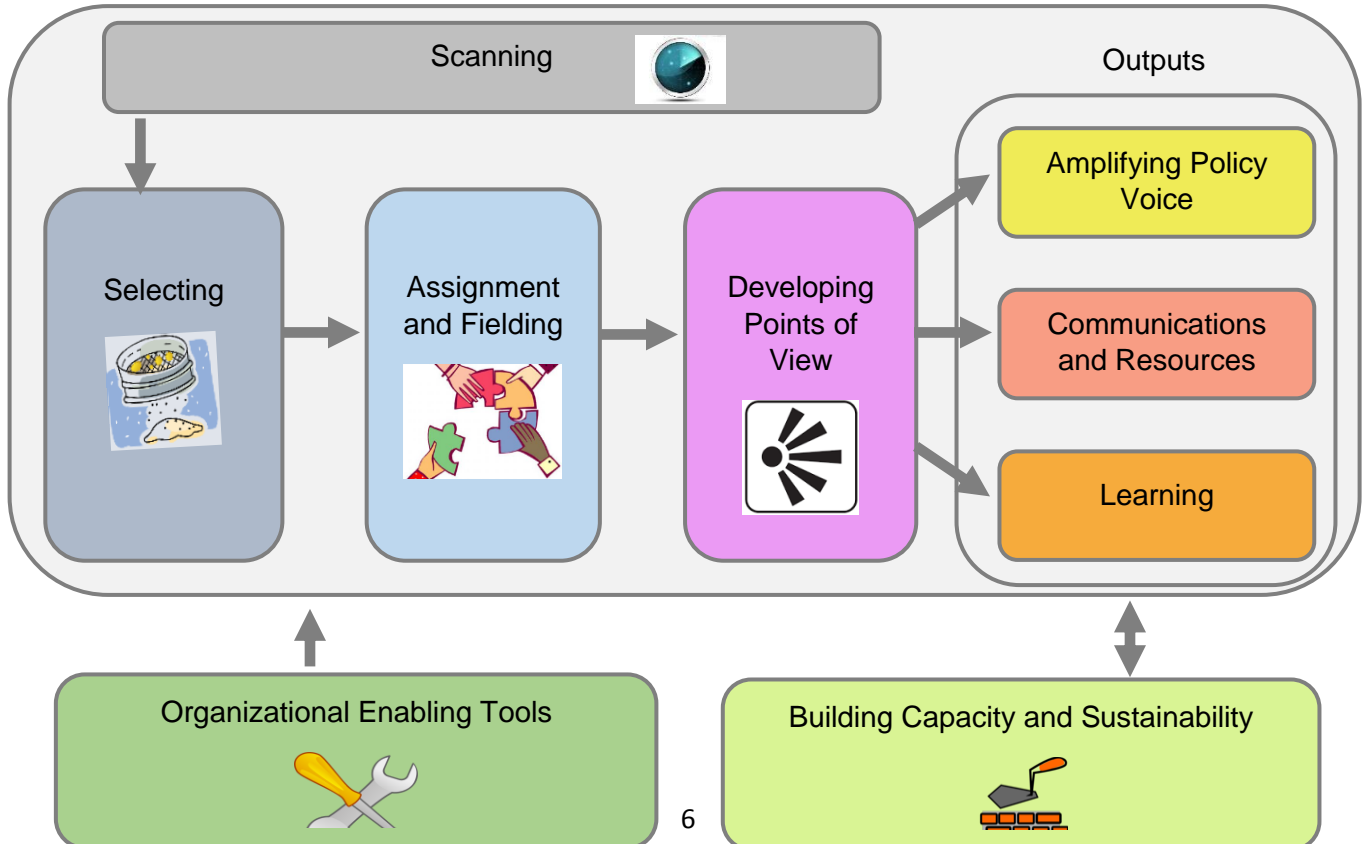
- OPPI will foster the development of the planners' knowledge and skills to deal with the issues and developments facing them and to create and manage change in the built, natural and social environments for the common good.

The above especially relates to the strategic directions of "Facilitate the exchange of knowledge and expertise for the betterment of planning in Ontario" and "Empower member ownership and community experience."

Deciding on Issues

Mega-Issue Themes	<p>Candidate issues identified in the activities of public affairs process below Criteria for selection to be approved by Council:</p> <ul style="list-style-type: none"> • Cross-cutting • In an area where planning knowledge and guidance is lacking yet required • Impacting the public interest now and in the future • Of sufficient interest to planners and members to spur engagement <p>Staff inform Council and maintain flexibility on themes in case circumstances change Level of effort will typically be anticipated in the Annual Plan</p>
Responsive	<p>Candidate issues identified in the activities of public affairs process below These are typically the government requests for input on proposed changes in legislation. Criteria for selection of these approved by Council:</p> <ul style="list-style-type: none"> • The scope of the impact of the issue -- affecting some, many or all planners • Of known interest and concern to planners <p>Methods to select issues include soliciting input from membership broadly and regionally, convening strategy groups, and/or joining efforts with partner organizations. Staff to balance level of planners' interest, effort required, gauging and facilitating appropriate response, informing Council in the Executive Director report. For issues that require OPPI developing a stand (affecting professional standing or practice), staff will seek Council's timely input on the position (or Executive Committee if the issue is pressing and Council is not available).</p>
Other Planning Issues	<p>Issues emerge in the activities of the public affairs process below OPPI provides a forum for peer exchange and discussion on issues:</p> <ul style="list-style-type: none"> • Nurtured with process and a 'follow the energy' approach allowing priorities for discussion and communities of interest to emerge • Those who wish to work on and contribute supported with easy self-serve tools • Other issues and ideas turned into learning, tools, and perspectives etc.

The Public Affairs Process



Public Affairs Activities – Illustrative:

<p>Scanning <i>What are planners talking about? What are the current issues?</i></p> <p>Methods:</p> <ul style="list-style-type: none"> - Member surveys - Monitor and scanning at district & strategy groups, knowledge exchange forum, etc. - Media monitoring - Target influencers - topics they are passionate about - Newsletters, magazines, websites - Attending meetings/conferences/events within and outside planning 	<p>Assignment and Fielding <i>How do we advance an issue and assign next steps?</i></p> <p>What is the optimal engagement level:</p> <ul style="list-style-type: none"> - Promote awareness? - Listening? - Leadership? - Partnership? - Interpreting policy? - Advising or developing policy? - Informing learning? - Low-hanging fruit for which we can simply create buzz on social media? 	<p>Developing Points of View <i>Getting a handle on the topics – what would it look like? (See also Stakeholder Engagement Framework)</i></p> <p>OPPI will strive to gain insight depending on the priority and depth of the issue and will:</p> <ul style="list-style-type: none"> - Seek out and listen to a diversity of perspectives - Contextualize the issue through the core competencies and perspectives relevant to our members/ What do planners do in their roles relative to the matter? <p>How:</p> <ul style="list-style-type: none"> - Work with members to access their knowledge and insight - Research the issue with stakeholders - Facilitate access to existing research - Look at models elsewhere in Canada and internationally - Leverage/encourage research from Planning programs. <p>Define:</p> <ul style="list-style-type: none"> - Identify the key choices and values which often underlie polarized views - Illuminate the inter-related nature of planning decisions (what else is impacted) - Suggest key questions and considerations - Point to best practice when available, any evidence and related research (noting research gaps that need to be filled) <p>Note: there may be multiple audiences beyond planners.</p>	<p>Amplifying Policy Voice <i>For issues on which OPPI wants to influence policy How do we affect policy?</i></p> <p>Bottom-up approach: Amplify critical policy voices on legislation from grassroots to related professionals and decision makers.</p> <p>Member input sets issues → senior staff uses criteria to decide whether and how to advance the issue → options to advance the issue include public policy influence, partnerships, special strategy group, etc. → OPPI provides advice to Council</p>
<p>Selecting <i>From the whole list of issues, how do we focus?</i></p> <p>Methods:</p> <ul style="list-style-type: none"> - Members may select issues at OPPI conference/symposium - Consultations with District, strategy groups - By vote via an app or on OPPI website - Recommended by the staff <p>Key Questions for selection:</p> <ul style="list-style-type: none"> - Is it in the planners' domain? - Can planners make a difference? - Does issue have an impact on Positive Planning System Change? - Is it timely and urgent? - Is it strategically important? - Does it make sense to our target audiences? 	<p>Which topics need development of a point of view or guidance?</p> <ul style="list-style-type: none"> - Does an issue require research? - What is the “footprint” of each issue? What areas does it touch? <p>Depending on the answers, an issue might go to:</p> <ul style="list-style-type: none"> - Council agenda for discussion - District - Planning Knowledge Exchange - Community of interest (these could be informal discussions on issues of interest to a minority) - Event planning - Partner institutions offering planning programs to inform their research. 	<p>Communications and Resources <i>What communications supports are possible?</i></p> <ul style="list-style-type: none"> - Media relations – identify who in the media may be interested in the issue. - Microsites/blogs/podcasts & social media – may partner with other stakeholders on this, piggyback on their social media. Help amplify. - Developing reports on issues. E.g. vital signs – trends, where we have been where we are going with this issue. Work on “health of the province of Ontario” on different issues – collaborate with planning programs in schools. Ties in with “for the betterment of planning in Ontario.” - Communicate research and evidence. One vehicle is position papers - similar to PAS (US) reports. 	<p>Learning</p> <ul style="list-style-type: none"> - Identify goals of learning – work backwards to determine how/where to start (Backwards design) - Metabolize issues into digestible chunks for learning and reference. - “Learn by doing”: Leverage subject matter experts to ID the key lessons/ takeaways - Work with identified stakeholders (other organizations) - Multi-platform, multimodal. <p>Learning can be also about members. Circle back. Now that members understand the issues, what are their new insights?</p>
<p>Organizational Enabling Tools – Templates & support <i>How do we make these activities happen? What will be needed from the organization?</i></p> <ul style="list-style-type: none"> - Provide platform, collaboration tools such as Google docs, knowledge management tools - “Lens tool” templates to support selection, fielding, points of view Allows comparison of footprints of various issues - Support to the volunteers required – new or existing groups - Financial resources - Membership directory: identify who is specialized in an area 		<p>Building Capacity and Sustainability <i>How do you keep these ideas going, bring them into the organization and out to the members?</i></p> <ul style="list-style-type: none"> - Learning modules: Orientation to the process to support new leadership after turnover - Leader Community: Volunteers/stakeholders working on an issue need a space to act as a member of the community, facilitate interaction. Could be Community of interest. - Leadership continuity: Engaging students and young professionals in the issues, leadership training - Evaluation/continuous improvement, gathering lessons learned and applying to improving programs and other resources. 	