



# GETTING EXCITED ABOUT PLANNING

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## Summary

This fact sheet provides information about how community planning can be a valuable tool for Indigenous communities seeking to plan for their future and work toward greater self-sufficiency.

**Keywords:** community engagement, managing the process, building capacity

## What is Community Planning?

Community planning is setting a direction for the future of your community. This includes the use of land, resources, services, and facilities. The end result should improve the health and well-being of your community.<sup>1</sup> In First Nations, community planning is a process that helps communities become more self-sufficient and build capacity.<sup>2</sup> A central idea in community planning is that the process is driven by the community rather than an exclusive group of leaders. The community planning process should be the result of a group effort and reflect the community's vision for its future.

## Planning in Indigenous Communities

Planning in Indigenous communities is unique for a number of reasons. Indigenous communities have different social, economic, and legal systems than non-Indigenous communities. Also, planning is not required in Indigenous communities. In non-Indigenous, long-range planning is required and must meet provincial standards.

Even though it is not required, many Indigenous communities see the benefits of planning. Community planning is an ongoing holistic process that touches on many topics like those in Figure 1. It helps your community build a roadmap to better sustainability, self-sufficiency, and capacity. Community planning includes input from as many community members as possible, including Elders, youth, and family representatives. Including a wide range of community members is important to the process. This helps community members understand other people's views on community needs, values, and priorities.<sup>3</sup>



**Figure 1 | Planning Areas Wheel.**

Adapted from (Indigenous and Northern Affairs Canada / Indigenous Services Canada. "CCP Handbook: Comprehensive Community Planning for First Nations in BC." Digital image. 2013. Accessed October 24, 2017. [http://www.aadnc-aandc.gc.ca/DAM/DAM-INTER-BC/STAGING/texte-text/ccphb2013\\_1378922610124\\_eng.pdf](http://www.aadnc-aandc.gc.ca/DAM/DAM-INTER-BC/STAGING/texte-text/ccphb2013_1378922610124_eng.pdf). p. 2.) Used with permission.

Community planning can help your First Nation work toward planning activities and goals including:

- Creating a shared community vision for your future,
- Defining priorities for future development, and
- Highlighting important cultural and ecological places that need to be or protected.

Often one of the first priorities for Indigenous communities is creating a Community Plan. These plans should be driven by the community. Information gathered through community engagement helps to build Community Plan. This often includes what its priorities are and what it wants for its future.

### ***Strategic Planning Documents***

There are a number of names for long-range planning documents. In non-Indigenous communities in Manitoba, they are usually called Development Plans.

In Indigenous communities, they are usually called Comprehensive Community Plans (CCPs) or Community Land Use Plans (CLUPs). These are only two examples, however, and there may be many other names for this type of planning document.

This set of fact sheets will use Community Plan to refer to any type of community-driven visionary or strategic planning document.

## ***Why Plan?***

The purpose of planning is to discover your community's vision, goals, and priorities. These are presented in a formal document known as a Community Plan. The plan is then used to guide future development. There are many benefits to having a Community Plan. This type of document sets and communicates your community's shared vision. It also provides a roadmap to achieve that vision.

Working toward these goals can build up your community. Planning can also help your community become more self-sufficient. Because it is not required on reserve lands, however, many First Nations need to communicate basic information about planning to community members and councils. This shows how they can benefit from a planning process.

## ***Demonstrating the Value of Planning***

Indigenous planning has always existed. Indigenous communities pre-date Canada and were planned according to their own traditions and sets of practices.<sup>4</sup> Since there has not been of history of formal, regulated planning

### ***Once implemented, an effective community plan can:***

- Empower your First Nation by putting your community in control of creating its own future
- Build capacity within your community by developing skills
- Improve communication within your government
- Improve communication between government and community members
- Coordinate decision making efforts
- Identify and solve problems
- Create a long-term vision that can help link projects beyond short election cycles
- Coordinate future development
- Anticipate future infrastructure and development needs
- Identify and protect valuable places, resources, traditions, cultural values, and practices
- Celebrate your traditions and culture
- Establish a positive vision for your community
- Address negative or painful community issues
- Promote healing and reconciliation
- Attract investment by communicating a clear interest and direction<sup>5</sup>

within Indigenous communities, planning is a new concept for many Indigenous communities. If your community is interested in planning, introduce the concept of planning to community members and councils. This should be done in a way that shows the potential value of planning for the community. To build support for the process, it is important for your community to take time to understand the benefits of planning and address questions or concerns. This also helps to build the relationships and participation required for successful community planning.

It is also important to communicate specific benefits and opportunities relevant to your community. This shows the value of planning to community and council members by creating a discussion. There are a number of ways to do this. One may be showing examples of other communities' plans and explaining how they helped the communities. The Community Plans included in the Additional Resources section below may be a good starting point. For more about how to use existing examples in order to demonstrate value,

see the fact sheet on Conducting Precedent Studies. A precedent study is usually done by the community's planning team. The planning team is the group of people selected to manage planning processes in a community.

For more information about this, see the fact sheet called *Establishing the Planning Team*.

## Final Thoughts

Planning can be a helpful tool to develop new skills, build capacity, strengthen relationships, and create a shared vision for the future. More importantly, planning can be a way for your community to work toward self-sufficiency and control over your future. As First Nations plan for the future, we see the positive impacts continue to unfold.

## Further Reading

**CCP Handbook: Comprehensive Community Planning for First Nations in BC** by Indigenous and Northern Affairs Canada

This handbook discusses how community planning can benefit communities and breaks down the community planning process into stages. The stages outlined in this handbook present only one approach to Indigenous Community Planning

### Indigenous Community Plans

Looking at the experiences of other First Nations can help to demonstrate the value of planning to community and council members in your own community. There are many other Indigenous Community Plans freely available online

Westbank First Nation Land Use Plan	<a href="http://www.wfn.ca/docs/2007-01-land-use-law-schedule-a.pdf">http://www.wfn.ca/docs/2007-01-land-use-law-schedule-a.pdf</a>
Tsawout Comprehensive Community Plan	<a href="http://tsawout.com/files/Lands/CCP/Tsawout_CCP_1-52.pdf">http://tsawout.com/files/Lands/CCP/Tsawout_CCP_1-52.pdf</a>
?Aq'am Community Strategic Plan	<a href="http://www.aqam.net/sites/default/files/AQAM_Our_Thinking_v2.pdf">http://www.aqam.net/sites/default/files/AQAM_Our_Thinking_v2.pdf</a>

## Endnotes

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# SECURING FUNDING SOURCES

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## Summary

This fact sheet provides information on how to secure funding sources for various planning initiatives, including Comprehensive Community Planning and Land Use Planning.

**Keywords:** funding, managing the process, reporting back

## Why Is Funding Important?

Community planning sets a direction for the future of your community and aims to improve your community's well-being. A good community plan can help your community understand its current position and make decisions for future improvement. Good community planning can even attract new investment into your community by determining a clear vision for the future of the community<sup>1</sup>. Your community plan may include the use of land, resources, services and facilities.

Indigenous communities receive funding from the Government of Canada. This is outlined in nation to nation agreements between the First Nation and the Government of Canada<sup>2</sup>. Planning projects often require funding beyond what is provided by the Canadian government<sup>3</sup>. Projects include a community or land use plan, and the implementation and monitoring of planning projects.

Without adequate funding, your community may be forced to abandon their community planning progress.

*Without adequate funding, your community may be left to abandon their community planning progress.*

## What Are the Different Types of Funding?

There are several available funding sources, all with their own approaches to funding. Regardless of source, all funding approaches share similarities and generally fall under two primary funding types: loans and grants.

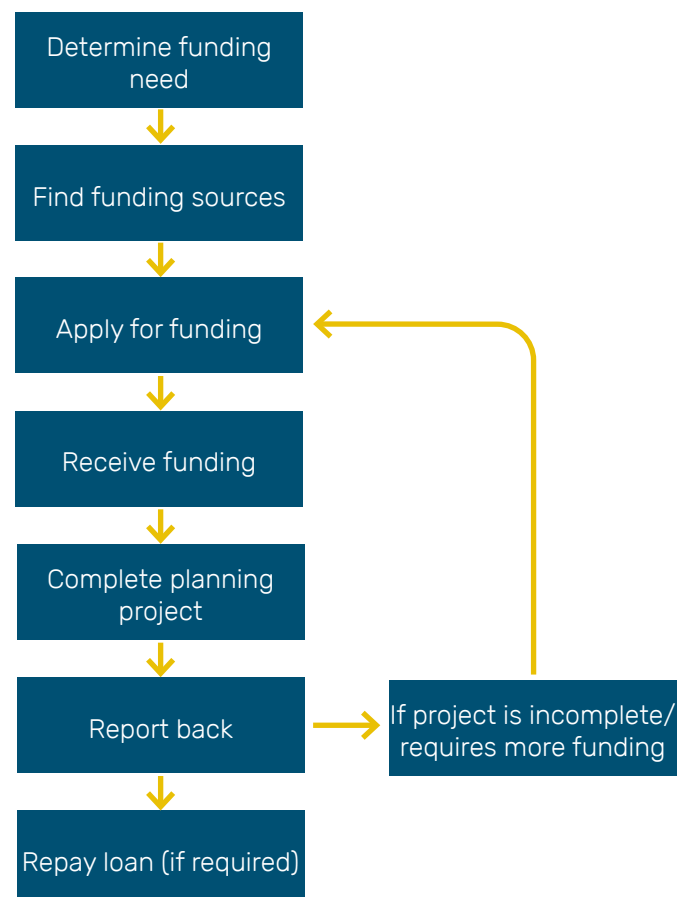


Figure 1 | The simplified funding process.

Loans

A loan is a sum of money provided to an individual or group to be used for a specific need. Regulations surrounding the use of the money are at the discretion of the lender and are outlined in an agreement between lender and recipient. For example, the lender may impose restrictions on how much money can be used for specific purposes.

A loan is not freely given by the lender. Loans are expected to be repaid in full to the lender. The repayment often includes interest, a rate added onto the loan amount to generate a profit for the lender<sup>4</sup>. This means that the overall amount repaid will usually be higher than the actual loan amount. Sometimes loans can be forgiven if certain conditions are met.

Grants

Like loans, grants are sums of money provided to an individual or group for a specific need. Unlike loans, grants do not need to be repaid. Grants will have a strict set of requirements to receive the money, which often include how the money can be used. Organizations will often provide grants dedicated to a specific use, such as housing or infrastructure. Your community can find grants that will support your community’s specific needs.

Different organizations have different criteria for grants, although many require the recipient to report the money’s use. Grantors often require completion reports that will match the budget outlined in a recipient’s grant application.

Choosing the Right Funding Model

The Government of Canada and Indigenous Services Canada (ISC) use various funding approaches when providing funding to First Nations communities across Canada<sup>5</sup>. These approaches vary. One approach closely follows the grant model while the remaining approaches lean towards a loan model of funding. The Canadian government describes these loan-oriented strategies as “contribution” approaches.

Contribution approaches provide money to communities, to be repaid later. Unlike conventional loans, this repayment will not include interest. Through a contribution approach, your community is provided money to be used under specific time and use conditions. These conditions are outlined in an agreement between your community and ISC. Any unused funds at the agreement’s deadline are returned to ISC. Although you do not need to pay interest on a contribution loan, your community may prefer grant funding.

The grant approach gives money to the receiving community with no expectation of repayment. This provides additional freedom to the community in using the funds. Your community will not need to repay these funds. However, grants must often be used within a specific time frame.

How Do You Secure Funding?

First Nations receive funding from the Government of Canada through various agreements, including the Indian Act and the Canada Common Funding Agreement for First Nations and Tribal Councils. This money is limited and planning projects, including Comprehensive Community Planning and Land Use Planning, often require an additional funding source.

Indigenous Services Canada (ISC) is the government agency which most often provides funding for such projects. Funding

allocations from ISC vary from year to year. In some years, ISC provides funding for creating land use plans. Other years they may focus on growing infrastructure. Depending on ISC’s focus, funding can often be used to support your community’s planning initiatives.

*Tips on Writing a Funding Proposal*

While some organizations will have a formal application form to complete, other organizations may require you to submit a written funding application that details what your community will be doing with the requested funds.

1

Prepare your proposal

- Understand what it is you’re requesting funding for. Have a clear understanding of the project, including background information, objectives and goals.
- Gather necessary information for the proposal, including budget costs.
- Plan ahead so that you don’t rush the process.

2

Writing the proposal

- Ensure that there is time to review and revise your proposal.
- Elements of a written proposal include: a cover letter, project summary, background information, project purpose, goals & objectives, opportunities, project process/timeline, budget, additional documentation.

3

Follow up

- Make contact with the organization and follow up on your proposal.

**Table 1 | Tips on Writing a Funding Proposal**  
Adapted from (Department of Public Safety and Emergency Preparedness, “Moving Toward a Stronger Future: An Aboriginal Resource Guide for Community Development,” Department of Public Safety and Emergency Preparedness, Accessed November 7, 2018, <https://www.publicsafety.gc.ca/cnt/rsrcls/pblctns/mvng-twrd-strngr-ftr/mvng-twrd-strngr-ftr-en.pdf>)



To secure funding, your community will first apply to a specific loan or grant program depending on your needs. The application process will vary between organizations. Some organizations will have a formal application form. Other organizations request open-ended funding applications. These funding applications are often in the form of a funding proposal. In both cases, you will need to know several details relating to your funding request, including the amount of funding required, and the projected timeline of the project.

Applications with specific forms will generally provide a list of required supporting documents that can help you determine what information is required when submitting the application. This list can help focus your application and help you determine what the priorities of your community are. For example, ISC's Lands and Economic Development Service Program Application requests various types of information<sup>6</sup>. The application requests that the programs seeking funding be listed with their objectives, planning activities associated, and a proposed budget<sup>7</sup>.

When determining a budget, the community needs to know what all the associated costs are going to be. The cost of completing a CCP can vary. CCP costs depend on: the priorities of the CCP, the scope of work to be completed, the level of community engagement, the level of analysis, the capacity to conduct the research, the number of actions and deliverables and the level of monitoring desired<sup>8</sup>.

Without this information, it can often be difficult to understand what is required in a funding proposal. Typically,

funding proposals incorporate the following sections: cover letter, title page, table of contents, project overview, background, project rationale, project goals & objectives, program description, budget, partnerships, project evaluation, follow-up, and appendices<sup>9,10</sup>.

## Where Can You Find Funding?

Funding is often limited. Organizations limit the amount of money allocation, scope the money can be used for, or the timeframe in which the money can be used. Your community should begin their planning process by identifying various sources for secure, long-term funding<sup>11</sup>. Without this step, you may find it hard to fund a planning project through to its completion. A Comprehensive Community Plan, for example, may take several years to complete, extending beyond your initial funding. You may need to seek out multiple funding sources to see a CCP through to its implementation and monitoring phases. Knowing about additional funding sources early on can make it easier to pursue additional funds when needed<sup>12</sup>.

Large governmental organizations, including ISC, are well equipped to provide funding for comprehensive community planning and other planning initiatives. Non-governmental organizations also provide funding that communities can use for planning initiatives. These funding sources can also provide funding for smaller specific planning tasks<sup>13</sup>. For example, smaller funding amounts can be directed to a specific community engagement event as part of the comprehensive community planning phase. Alternatively, an infrastructure project that has been identified through the planning process can apply for project-specific funding.

## Final Thoughts

Acquiring funding for planning is a crucial first step in the planning process. Without adequate funding, communities will find it hard to complete their Comprehensive Community Plan. Organizations often provide limited funding that will not cover the entire cost of completing the plan. It is important to seek out options for additional funding later in the planning process.

**Figure 2 | Provincially funded housing initiative.**

Source (Province of British Columbia. "Affordable rental homes under construction in Courtenay." Digital image. Flickr. May 2018, Accessed Feb 2019. <https://www.flickr.com/photos/bcgovphotos/27410510707>. Used with permission. <https://creativecommons.org/licenses/by-nc-nd/2.0/legalcode>.)



## Further Reading

**CCP Handbook: Comprehensive Community Planning for First Nations in BC** by Indigenous and Northern Affairs Canada

This handbook outlines the CCP process in British Columbia and has been a tool for Indigenous Community Planning across Canada.

**Moving Toward a Stronger Future: An Aboriginal Resource Guide for Community Development** by Public Safety Canada

This guide provides resources for Community Development in Indigenous Communities, including tools and guides to use in practice.

## Endnotes

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# ESTABLISHING A PLANNING TEAM

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*December 2016*

## Summary

This fact sheet outlines what the planning team is, who the members of the team are, when they operate, and why they are important.

**Keywords:** planning team, managing the process, funding, building capacity

## What is the Role of the Planning Team?

Your planning team guides, organizes, and develops your planning process. They give advice to Council about projects, policies, and procedures. However, your planning team should not make all of the decisions for your community. Instead, your planning team should engage with the community to understand their views. Your team must also consider the directions and recommendations by Chief and Council and administration.

One of your planning team's first tasks is to identify planning projects to include in the Community Plan. The planning team also:

- **Leads** the planning process, communicates with the community, and carries out related tasks as required;
- **Creates** an annual work plan;
- **Completes** and applies training related to the planning projects;
- **Interprets** community feedback to make recommendations to Council<sup>1</sup>

## Roles of the Individual Planning Team Members

The roles of individual team members is based on the tasks listed above. Before work begins, it is important to have each of your planning team members agree to expectations, meeting schedules, and roles of the group. This agreement is often called the terms of reference. Consistent attendance is important so that all team members share in the discussions and work.

Your planning team must work well together to be effective. Tension among team members can stop discussion, prevent ideas from flowing, and slow progress on projects. When forming a planning team, consider people who are able to work well together and even have fun. With that said, it is important to stay on track and make sure meetings focus on planning projects. All planning team members must be prepared to:

- Come prepared to each meeting;
- Bring forward the best, unbiased information possible;
- Attend capacity building events;
- Be informed on current events relevant to the team mandate; and
- Act in the best interest of the community.<sup>2</sup>

## Who is Involved in the Planning Team?

Planning teams often include volunteers, band administrators, and elected leaders from the community. Selecting members for your planning team is an important step and must be done early in the planning process. It is important for your planning team to include people who can represent different groups in the community, but this can also be very complicated. Below are some ideas to help you start thinking about who might be on the team:

- Administrators, managers, or staff the band office;
- A mix of men and women;
- Board of Directors;
- Chief and Council;
- Leaders of local organizations and community groups;
- A mix of family groups, Elders, and youth.<sup>3</sup>



There are a few other considerations when choosing team members. It is important that members are prepared for the time commitment that the team requires. Planning team members should also be trustworthy and reliable. They should enjoy participating in discussion, passionate about your community, and eager to solve the issues that it faces. It is important to select members who know what is happening in the community and are able to access local knowledge holders.

“We involved the entire Squiala community. We have a representative Community Development Plan committee including elders, youth, council and staff. We also have a strong project team with fully involved council, staff, planning consultants, legal advisor, technical support from INAC, and staff and politicians from the municipality of Chilliwack. We let consultants go when they wanted to tell us what they thought we wanted, instead of listening to the community members.”<sup>14</sup>

– Squiala First Nation of the Slo:lo Nation, British Columbia

## Who Adds to the Planning Team’s Success?

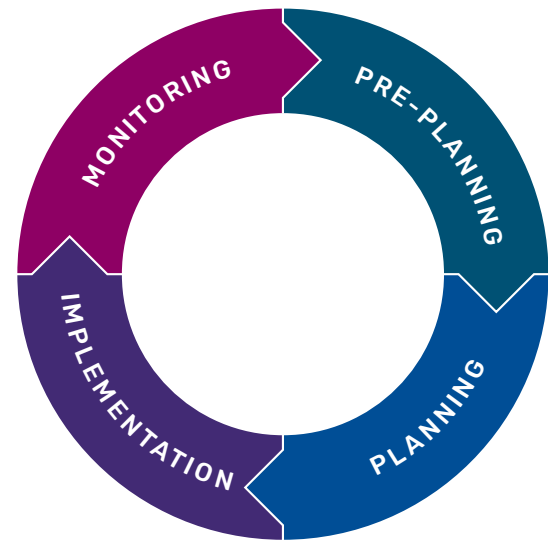
A good Community Plan relies on good direction and community consultation. While many First Nations plan without help from a professional planner, others find them valuable. If a professional planner is involved, they should help teach skills in the community. They should be a mentor and trainer to members of your planning team, “and not the leader or decision-maker.”<sup>4</sup>

A ‘community champion’ or the ‘planning champion’ can be helpful to your planning team. The champion often introduces “the idea of planning to the community and leadership, and can drive the process, gain support, and help build a planning team.”<sup>5</sup> The champion brings people together, making them feel comfortable and included. They are passionate about working with and learning from members in your community.<sup>6</sup> They may come forward as a result of a proposed development, a move into the Treaty Land Entitlement process, or an issue that gets people talking. Just like your planning team, the “champion needs to be based in the community, respected by community members, and prepared for a long-term commitment to the planning process.”<sup>7</sup>

In the implementation stage, your community starts carrying out projects identified in the planning stage. Lengthy projects often involved professionals like project managers and consultants. These people manage and oversee the day-to-day progress of projects.<sup>8</sup> Regular progress meetings with the project management team, planning team, Chief and Council, and administration are important. These meetings make sure any “large changes to the costs, timelines or nature or quality of work” reflect the community’s desires.<sup>9</sup>

## When Does the Planning Team Operate?

The planning team is involved with the Community Plan at every step in the planning cycle (Figure 1).



**Figure 1 | The planning cycle.**

Adapted from (Indigenous and Northern Affairs Canada / Indigenous Services Canada. “CCP Handbook: Comprehensive Community Planning for First Nations in British Columbia, Third Edition.” 2013. Accessed October 24, 2016, [http://www.aadnc-aandc.gc.ca/DAM/DAM-INTER-BC/STAGING/texte-text/ccphb2013\\_1378922610124\\_eng.pdf](http://www.aadnc-aandc.gc.ca/DAM/DAM-INTER-BC/STAGING/texte-text/ccphb2013_1378922610124_eng.pdf). p. 14.) Used with permission.



Planning team members are part of the planning process until Chief and Council:

- Reviews the planning team and decides that membership should change to best serve the community;
- Disbands the team; or
- Dismisses a member for not adhering to the team's Terms of Reference or Code of Conduct.

Otherwise, team members can stay as long as there is need and funding.<sup>13</sup>

## Final Thoughts

Your planning team makes sure your planning process stays on track from beginning to end. The team leads the process, organizes events, listens to community input, oversees projects, and reports progress back to community members.

The team works closely with Chief and Council, consultants, and community members to create a Community Plan everyone can be proud of.

## Further Reading

### **Tsal'alh Comprehensive Community Planning Team Terms of Reference** by Seaton Lake Band

This document makes recommendations to Council regarding administration of projects, policies, procedures that support the effective pre-planning, planning, implementation, monitoring, and evaluation of the Tsal'alh CCP.

<http://fnbc.info/resource/tsal-alh-comprehensive-community-planning-team-terms-reference>

### **Comprehensive Community Planning Training Program Materials** by Centre for Indigenous Environmental Resources

This provides variety of information resources to participants to support their efforts in the development and implementation of an integrated community sustainability plan. Resources are also available in English and French.

<http://www.yourcier.org/comprehensive-community-planning-training-program-materials.htm>

## Endnotes

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# WORKING WITH A PROFESSIONAL PLANNER

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## Summary

This fact sheet outlines what a professional planner is, what skills they can potentially offer, and the potential roles they can take on in an Indigenous community's planning process. It talks about some of the benefits to working with a planner, how to find one, and the professional and ethical standards planners follow.

**Keywords:** community engagement, managing / storing data, managing the process, planning team, mapping, funding, building capacity

## What is a Professional Planner?

During the planning process, a community may choose to work with a professional planner. Professional planners are private consultants who can offer different services throughout a community's planning process. Registered Professional Planners (RPPs) are certified through the Professional Standards Board. They must act in accordance with the Canadian Institute of Planners' Code of Professional Conduct, and are regulated by provincial/territorial and national planning organizations. They have skills and expertise in different areas related to planning.<sup>1</sup> A professional planner should be someone who spends time listening to what a community needs, and offer suggestions based on each community's context and set of needs. They often work with other professionals like engineers, architects, designers, and map-makers.<sup>2</sup>

## What are a Professional Planner's Roles?

Professional planners can take on many roles when working with a community. However, a community's planning process should be driven by the community and not a professional planner. The professional planner can play a key supporting role to the planning team in the planning process.<sup>3</sup> See *Establishing a Planning Team* for more information.

They can be a trusted advisor, and may also be a coordinator between the community planning team and a professional team of consultants.<sup>4</sup> If your community decides to work with a professional planner, their role should be decided up front and written in a terms of reference. Sometimes, a planner's role may change during the planning process.<sup>5</sup>

## Terms of Reference

The 'terms of reference' is an important tool to help guide the planning process. It clearly sets out who does what, and builds accountability.<sup>14</sup> It provides a way to evaluate the work of a professional planner, as well as a way to define the scope of their work once a planner is chosen.<sup>15</sup> It can help to define the role the professional planner in the planning process, and ensure that a planner meets the needs of the community. Terms of reference can also help to avoid conflict, inadequate deliverables, lack of community input or use of local knowledge.<sup>16</sup>

The community should give their feedback on what they understand the role of the planner to be. This can help create trust, communication, and increase the involvement of community members.<sup>6</sup> It is also important for the Chief and Council to support the planner and their role in the community-led planning process.

A planner should be clear on what skills and capacity they bring to the project. Some of a planner's skills might include:<sup>7</sup>

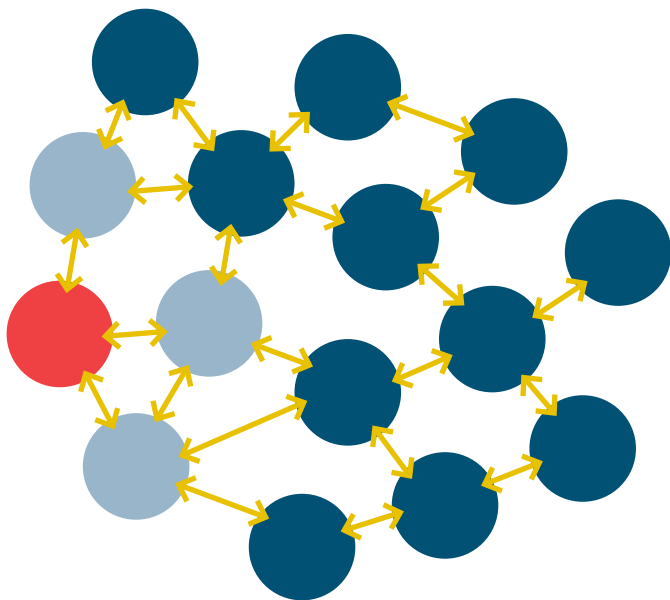
- Design and facilitate community engagements
- Gather community background information & research
- Compile and analyse results from community engagement and surveys
- Help communicate results to the community
- Create maps of the community & region
- Create action plans
- Help create vision statement
- Set goals & objectives

## Building Capacity

A community should identify what their internal strengths and weaknesses are before talking to a professional planner. It will help decide why a planner could be useful, define their role, and show where the community needs capacity.

Professional planners can help build capacity in the community for the planning process.<sup>18</sup> Whenever possible, a professional planner should offer to train a community member a skill involved in the planning process, like a mapping or spreadsheet program. The more capacity a community has, the more it will be able to initiate and carry on its future planning processes.<sup>19</sup>

Figure 1 shows how community leaders (light blue dots) and a planner (red dot) and can learn from each other. Community members (blue dots) can also learn and develop new skills. Capacity is built when information, skills, and lessons learned (yellow arrows) spread in all directions, among community members, leaders, and consultants on even ground.



**Figure 1** | Building capacity from the planner to a community member and then to the wider community.

## Why Work With a Professional Planner?

A community may decide to work with a professional planner for several reasons. The planning team may need some help with a heavy workload in the community planning process because they don't have enough help from inside the community. Also, a planning team may not have some important knowledge or technical skills needed for the planning process, which a professional planner could provide.<sup>8</sup>



**Figure 2** | Map making, one service a professional planner can offer  
Source (Spratt, Annie. "Vintage Map Photo." 2018. Unsplash. <https://unsplash.com/photos/BkbbuQdX06A>.)

## How to Choose a Professional Planner?

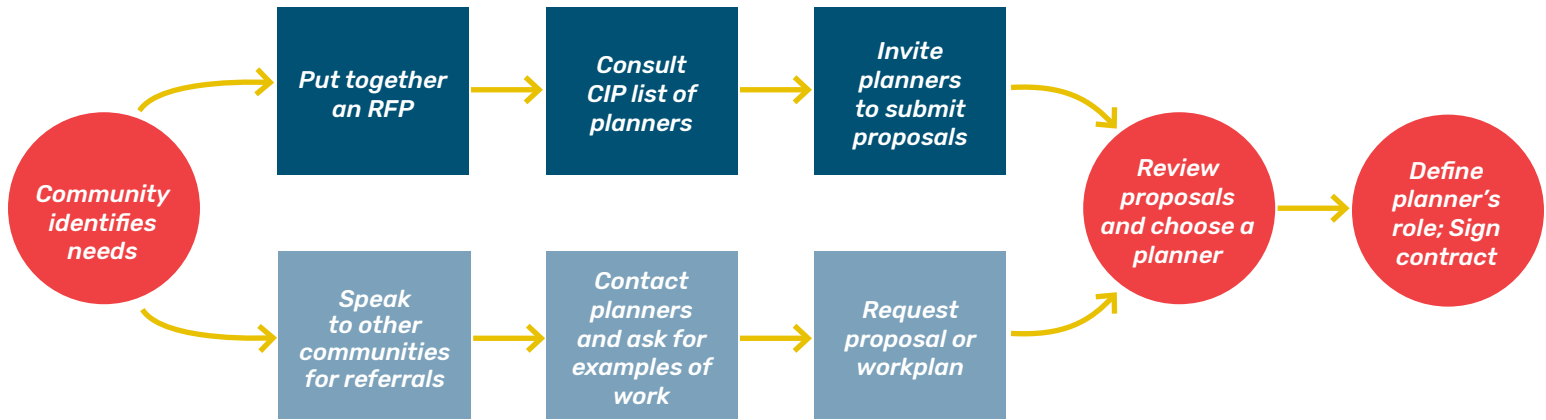
A professional planner is often chosen based on a referral from another community. It is a good idea to ask for three or more references from other Indigenous communities to get a sense of a planner's work.<sup>9</sup> Speaking to members of the planning team is very important to get an idea of the quality and accuracy of their work, and whether the community was satisfied.

A community may choose to use the request for proposal (RFP) process to hire a planner.

The Canadian Institute of Planners (CIP) maintains an updated list of professional planners who work with First Nations that can be acquired by contacting the CIP (see *Further Reading*). Based on that list, planners can be invited to submit a proposal. They should be told the expectations and planning timelines. Choosing a professional planner based on their RFP proposal is best done by a committee or group from the community.

## Request for Proposal (RFP)

A RFP is a document created by a business, government or Indigenous community asking for professional help with a project. It is circulated to consultants and other professionals inviting them to submit a proposal for how they would do the work in the project. It's a competitive process, so how much a project will cost, and how long it will take are important factors. The RFP outlines many things: the projects background, purpose, objectives, completion date, and budget.<sup>17</sup>



**Figure 4** | Choosing a planner can be done through RFP (top) or referral (bottom). The circles represent steps common to both approaches.

## What are the Expectations?

Planners should:<sup>10</sup>

- Commit to engaging the community from the beginning
- Build a strong working relationship with the community, the planning team, and Chief & Council
- Be conscious of the community's history, culture, and political structure
- Recognise where the community is lacking capacity and skills
- Offer resources and training

Your community should:

- Review the work of the professional planner and provide feedback
- Be responsible for coordinating meetings with community members as well as with Chief & Council

## Code of Ethics & Conduct

Professional Planners in Canada are guided by two codes:

### Code of Ethics<sup>11</sup>

This code says planners must be competent in their area of planning practice, and know how to apply their knowledge and understanding. Planners must also have integrity and a sense of responsibility to their profession, employers, clients, and the public.

#### **competent**

having necessary ability, knowledge or skill to do something successfully

#### **integrity**

being honest, and having moral principles

### Code of Professional Conduct<sup>12</sup>

This code outlines a planner's responsibility to the public, clients, employers, and to other planners. It basically says all planners must be respectful, honest, knowledgeable, and behave with honour and in a way that doesn't cause conflict.

## Ownership, Control, Access & Possession

Standing for ownership, control, access and possession, OCAP is the standard that sets how First Nations' data should be collected, protected, used, and shared.<sup>13</sup> It guides how to conduct research with First Nations, and stresses that First Nations own data collected in their communities, and should control how the information can be used, always have access to it, and have it in their possession.

A professional planner continues to participate in a community's planning process until the end of their contract. The hope is that they have provided valuable work, and added to the community's internal capacity to plan. Provided their work has benefitted the community, they may continue to be involved in the community's ongoing planning activities.



**Figure 5** | The principles of OCAP. At the centre of any data & information collected about a community will always be a commitment to the principles of OCAP for the community.



## Further Reading

**Comprehensive Community Planning for First Nations in British Columbia, 3rd edition** - Indigenous and Northern Affairs Canada

This is a useful guide for all First Nations communities in Canada. Available at: <http://www.aadnc-aandc.gc.ca/eng/1100100021966/1100100021970>

**Sharing 96 Best Practices of First Nations Comprehensive Community Planning** - Jeff Cook, MAP: Beringia Planning Inc.

This is a detailed guide of best practices for First Nations engaging in a planning process. Available at: <http://www.newrelationshiptrust.ca/wp-content/uploads/2017/04/comprehensive-community-planning-long-version.pdf>

### The First Nations in BC Knowledge Network

The website provides a large body of valuable resources useful to First Nations doing community planning. Available at: <https://fnbc.info/resources>

### The Canadian Institute of Planners

The professional association for planners maintains an updated list of professional planners who work with First Nations: Tel: (800) 207-2138; (613) 237-7526; Fax: (613) 237-7045; email: [reception@cip-icu.ca](mailto:reception@cip-icu.ca). Web-site: [www.cip-icu.ca](http://www.cip-icu.ca)

## Endnotes

- 1 Jeff Cook, "Gaining Momentum: Sharing 96 Best Practices of First Nations Comprehensive Community Planning," *New Relationship Trust*, 2009, <http://www.newrelationshiptrust.ca/wp-content/uploads/2017/04/comprehensive-community-planning-long-version.pdf>, p. 14.
- 2 Real Property Services for Indigenous and Northern Affairs Canada, "First Nations and Aboriginal Communities Project Management Manual," *Indigenous and Northern Affairs Canada*, 2000, <http://publications.gc.ca/site/archivée-archived.html?url=http://publications.gc.ca/collections/Collection/P25-5-3-2000E.pdf>, p. 3.
- 3 Indigenous and Northern Affairs Canada, "CCP Handbook: Comprehensive Community Planning for First Nations in British Columbia, Third Edition," *Indigenous and Northern Affairs Canada*, 2016, Accessed October 24, 2017, [http://www.aadnc-aandc.gc.ca/DAM/DAM-INTER-BC/STAGING/texte-text/ccphb2013\\_1378922610124\\_eng.pdf](http://www.aadnc-aandc.gc.ca/DAM/DAM-INTER-BC/STAGING/texte-text/ccphb2013_1378922610124_eng.pdf).
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- 12 CIP, 2010, p. 12.
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- 14 Cook, 2009, p. 22.
- 15 Cook, 2009, p. 37.
- 16 Cook, 2009, p. 36.
- 17 David Witty, "Professional Practice Manual," *Canadian Institute of Planners*, 2002, <http://municipalcapacity.ca/+pub/document/resource-materials/planmanual.pdf>, p. 67.
- 18 INAC, 2016, p. 75.
- 19 Cook, 2009, p. 42.

# CREATING A WORK PLAN

by Michael Erlanger  
& Michael Blatz

Indigenous Planning Studio  
December 2016

## Summary

This fact sheet describes how to make a work plan to organize and manage your community planning process.

## Keywords:

communication tools, managing the process, direction setting, planning team, funding

## What is a Project Work Plan?

Your project work plan is a way for you to organize your planning process. It breaks down your multi-year process into smaller pieces. This helps to organize and manage your process to keep things running smoothly. Your work plan includes details about the activities, roles, timelines, and budgets of your planning process.<sup>1</sup>

## Activities: What Needs to be Done?

### Overall Project Scope

Your project scope is a detailed description of the planning process. It is a good way to start thinking about what needs to happen along the way to complete the planning process. It describes:

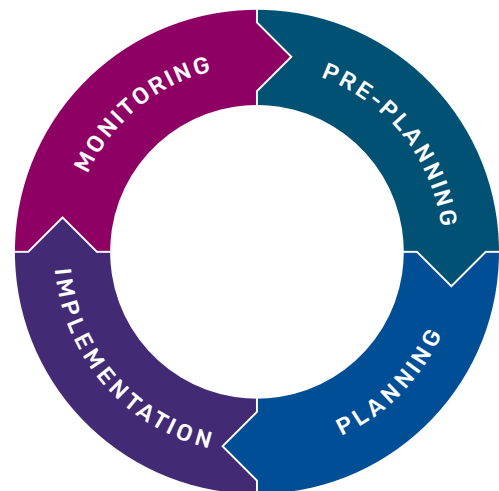
- what it is
- why it is important
- who will be involved
- who will benefit
- where it will take place
- when it will happen
- how much it will cost
- what resources are needed

Defining the scope can help you and your community understand what needs to be done. The more detailed the description the better.<sup>2</sup> That being said, there are often many unknowns and the project may change over time. When these changes happen, you can look back at the original scope to see how they fit into the overall process.

## Phases and Major Tasks

The next step is to think about the phases and milestones for the planning process. Indigenous and Northern Affairs Canada (INAC) describes the planning process in four main phases:

1. pre-planning,
2. planning,
3. implementation, and
4. evaluation and monitoring



**Figure 1 | The planning cycle.**

Adapted from (Indigenous and Northern Affairs Canada / Indigenous Services Canada. "CCP Handbook: Comprehensive Community Planning for First Nations in British Columbia, Third Edition." 2013. Accessed October 24, 2016, [http://www.aadnc-aandc.gc.ca/DAM/DAM-INTER-BC/STAGING/texte-text/ccphb2013\\_1378922610124\\_eng.pdf](http://www.aadnc-aandc.gc.ca/DAM/DAM-INTER-BC/STAGING/texte-text/ccphb2013_1378922610124_eng.pdf). p. 14.) Used with permission.

Next, think about the major tasks that you need to do during each phase. Also start thinking about how you will complete each task. This will be harder for the implementation and evaluation phases since they come later in the planning process. Instead, focus more on major tasks during the planning phase:

- gather background information
- complete community analysis
- create vision statement and values
- build a comprehensive strategic framework
- set goals and objectives
- identify projects
- create an implementation strategy

### Roles: Who Will Be Involved in the Activities?

Think about the people who will need to be involved to carry out each task and activity. Often, these people will either lead the activity or participate in it.

Once your list of tasks is complete, your planning team can assign a task leader to carry out each item. The person in charge of a task should have the right skills to do a good job. Sometimes this means a community member gets more training. For bigger or more complicated tasks, the leader might need a few other people to help out.

Next, think about any people who should participate to carry out your tasks. You might need to interview Elders, consult an engineer, or reach out to an organization. Some tasks may have many participants and some may have none.

Throughout the planning process, it is important to include a wide range of people like Elders, youth, men, women, family groups, on-reserve members, and off-reserve members. Figuring out who needs to be involved at this stage helps make sure no one important gets left out. It also helps you think about the best ways to get participation from different groups of people.

For more information about this, see *Establishing the Planning Team* and *Working with a Professional Planner*.

### Timelines: When Will Tasks Get Done?

Your planning team works together to create and maintain a master schedule throughout the life of the planning process. This schedule might include key milestones like community engagements, construction periods, and fund-related deadlines.

To get started, think about the phases, milestones, tasks, and activities that you came up with. Lay out the phases and major milestones first before moving on to the smaller items. Next, think about which items need to get done in a certain order and which ones can get done at the same time. Your timeline will likely change over the course of the planning process but having one can help keep things on schedule.

Gantt charts show the start and end dates of tasks. These are helpful when figuring out the sequence of tasks. Some versions of Microsoft Excel come with a Gantt chart template or you can create your own.

Table 1 | Example of a Gantt Chart.

	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Task 1														
Task 2														
Task 3														
Task 4														
Task 5														
Task 6														
Task 7														
Task 8														

## Budgets: How Much Will This Cost?

Based on your list of tasks, you can start to estimate costs and create your budget. Start by thinking about any costs associated with the people and resources involved in each task. Costs may include printing documents, providing food at community engagement events, getting training for planning team members, hiring a consultant, or buying new equipment. Similar to your timeline, your budget and costs may change, but creating a budget can help you to prioritize items.

## Final Thoughts

You may find it helpful to organize the tasks, roles, timeline, and budget together to give you an overview of the planning process. This could look something like the table below.

Alternatively, tools like a Gantt Chart and budget can show very detailed schedules and costs. Both the broad view and detailed view are important to keep in mind throughout the planning process.

**Table 2** | Example of how to organize work plan tasks in a table.

Phase	Tasks	Leader	Team	Participants	Timeline	Resources	Budget
Pre-Planning	Task 1	Jane	-	Elders	5 days	printing	\$20.00
Pre-Planning	Task 2	Sally	Bob, Mary	engineer	3 months	-	\$5000.00
Planning	Task 3	...					
Planning	Task 4	...					

## Further Reading

**CCP Handbook: Comprehensive Community Planning for First Nations in BC** by Indigenous and Northern Affairs Canada

The Comprehensive Community Planning Handbook was created in British Columbia and has been used to guide Indigenous planning across Canada.

[https://ccednet-rcdec.ca/sites/ccednet-rcdec.ca/files/the\\_ccp\\_handbook.pdf](https://ccednet-rcdec.ca/sites/ccednet-rcdec.ca/files/the_ccp_handbook.pdf)

**The Canadian Institute of Planners Professional Practice Manual** by David Witty.

The section titled 'Planning to Plan' on pages 56-63 expands on ideas presented here.

<http://municipalcapacity.ca/+pub/document/resource-materials/planmanual.pdf>

## Endnotes

- 1 Indigenous and Northern Affairs Canada, "CCP Handbook: Comprehensive Community Planning for First Nations in British Columbia, Third Edition," *Indigenous and Northern Affairs Canada*, 2013, Accessed October 24, 2016, [http://www.aadnc-aandc.gc.ca/DAM/DAM-INTER-BC/STAGING/texte-text/ccphb2013\\_1378922610124\\_eng.pdf](http://www.aadnc-aandc.gc.ca/DAM/DAM-INTER-BC/STAGING/texte-text/ccphb2013_1378922610124_eng.pdf). p. 22.
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*Coming soon*





# BUILDING A COMMUNITY ATLAS

by **Bradley Muller**  
*Indigenous Planning Studio*  
December 2016

## Summary

This fact sheet explains what a community atlases are, how they are used, and why they are helpful in for an Indigenous community planning process.

**Keywords:** community engagement, communication tools, collecting data, mapping, oral tradition, building capacity

## What is a Community Atlas?

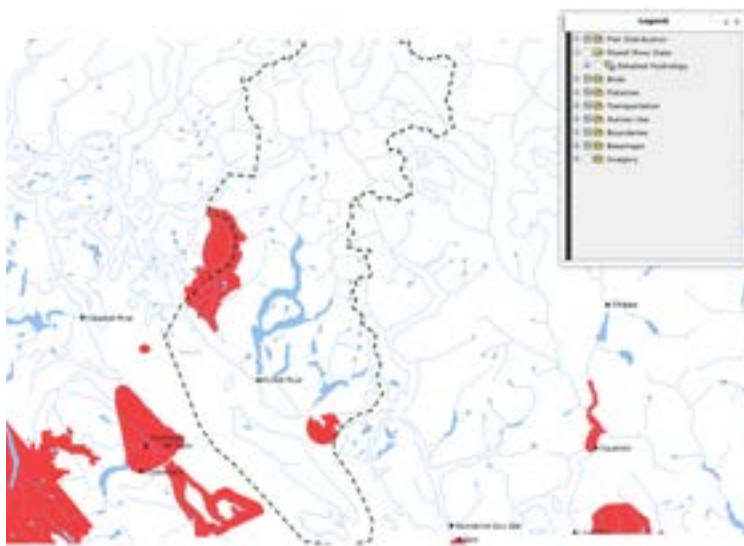
A community atlas is a collection of maps. The maps included in a community atlas show things that are important to your community. This might include traditional food sources, environmental issues, animal migration patterns, housing locations, and much more. This way, your community can show local traditional knowledge along with technical data to provide meaningful insights into the landscape. A community atlas can be made up of hand-drawn maps, interactive online maps, or any other format that works for you. When combined, these maps can tell a story, inform a report, and be used

when engaging with your community. This guide outlines typical a community atlas' purpose, process, management. Even though this is a collection of technical documents, they should be presented in a manner that is easy to read and use by everyone.<sup>1</sup>

## Why Make a Community Atlas?

A community atlas is useful during the beginning stages of your community planning process to refer to and build on. Maps are used to record and show information when making planning decisions. An organized community atlas shows data and community knowledge visually. The maps are often used in planning documents and as a way to spark conversations with community members about their space.

A community atlas can also be useful when speaking with outside groups like Environment Canada, engineers, and planners. Community atlases are one way to make a simple and organized information package to help make decisions.



**Figure 1 |** An interactive online map of fish and bird habitats in the Powell River Watershed.

Source (Digital image. Community Mapping Network. 2015. <http://cmnmaps.ca/POWELLRIVER/>) Used with permission.

"The atlas should be used as a jumping off place for decision making about the future. From the holistic image of place that the maps collectively communicate, what actions could be adopted to achieve sustainable prosperity? What priorities emerge from a survey of damaged lands and unsolved social ills? What underutilized potentials can be put to work to help achieve sustainability? The atlas can become a focus for discussions setting a proactive plan for positive change."<sup>3</sup>

Doug Aberley

Community atlases are also a way to learn more about your community by combining, organizing, and styling maps. For example, the Gulf Islands Ecosystem Community Atlas combined community knowledge, land elevations, and soil make-up. In the end, the map showed both human and environmental interests.<sup>2</sup>

Who Makes a Community Atlas?

Community involvement is an essential part of the process. Many groups of people can help with a community atlas at different times. Band leadership, government, and others may also be involved with your community atlas depending on your collection of maps. Table 1 outlines who is involved depending on what stage the atlas is in.

How do you Create a Community Atlas?

Before you make your community atlas, clearly lay out its purpose. The purpose will help you decide the style, use, and contents of the community atlas. It is helpful to look at

existing maps and mapping resources. Are there already GIS maps? Has the community already created maps?

Once the purpose of the atlas is decided, select the best data and style for the map’s purpose. Extra information or maps can be added as an appendix to larger planning documents.

Many communities like to use traditional knowledge and practice as part of their maps. To do this, discuss the structure and contents of the atlas with community members. Community members can improve maps using their local and traditional knowledge. This can also create a sense of ownership and relevance within the community.

When do you use a Community Atlas?

Community atlases can be made and re-made to work for different uses that come up. They can be used to start discussion with community members, band leaders, or consultants. They can be used as data in technical reports.

Table 1 | Common tasks and people involved in each stage of building a community atlas.

	Tasks	People Involved
Preparing to Build Your Community Atlas	<ul style="list-style-type: none"><li>decide the atlas’ purpose and think about how it will be used</li><li>decide what information you will need</li></ul>	<ul style="list-style-type: none"><li>involve experts in mapping and land use planning if needed</li><li>involve community members to ensure they help define the purpose of the atlas and provide locally relevant guidance</li></ul>
Creating Your Community Atlas	<ul style="list-style-type: none"><li>collect the data and community input you need</li><li>organize the data you collected</li><li>What information is missing or incomplete?</li><li>How will you want to display this information on maps?</li><li>How will you analyze and display the data?</li></ul>	<ul style="list-style-type: none"><li>depending on the purpose and use of your community atlas you will need input from different people:<ul style="list-style-type: none"><li>land use planners</li><li>mapping technicians</li><li>local politicians</li><li>community members</li></ul></li></ul>
Using Your Community Atlas	<ul style="list-style-type: none"><li>if your community made a map for a specific reason, you already know how it will be used.</li><li>other uses can include:<ul style="list-style-type: none"><li>a large community display</li><li>existing reports or planning documents</li></ul></li></ul>	<ul style="list-style-type: none"><li>your band office may want to include maps from your atlas in reports, plans, and documents</li><li>land use planners, consultants, and local government may include your atlas in their work</li><li>your atlas can be used with the broader community as an interactive learning, engagement, and communication tool.</li></ul>

## Further Reading

### Aboriginal Mapping Network by Ecotrust

This site focuses on the Aboriginal Mapping Network and hosts resources for mapping Indigenous communities. The link to Chief Kerry's Moose: A Guidebook to Land Use and Occupancy Mapping, Research Design and Data Collection, Terry N. Tobias has mapping tools for Land Use Planning.

<http://ecotrust.ca/project/aboriginal-mapping-network/>

<http://nativemaps.org/taxonomy/term/72>

### Community Mapping Network

This website has over 60 examples of community atlases. It was created to share natural resource information with communities in British Columbia.

[http://www.cmnbc.ca/atlas\\_gallery](http://www.cmnbc.ca/atlas_gallery)

An example of an interactive online Community Atlas:

<http://cmnmaps.ca/POWELLRIVER/http://cmnmaps.ca/POWELLRIVER/>

## Endnotes

- 1 Community Mapping Network, "About CMN | Community Mapping Network," *Community Mapping Network*, n.d., Accessed October 25 2016, <http://www.cmnbc.ca/about-cmn>
- 2 Tara Sharma, "Southern Gulf Islands | Community Mapping Network," *Community Mapping Network*, 2016, Accessed October 25 2016, [http://www.cmnbc.ca/atlas\\_gallery/southern-gulf-islands](http://www.cmnbc.ca/atlas_gallery/southern-gulf-islands)
- 3 Sheila Harrington & Doug Aberley, *Giving the Land a Voice: Mapping our Home Places* (Salt Spring Island, BC: Salt Spring Island Community Services Society, 1995).



# CREATING A COMMUNITY PROFILE

by *Jessie Russell-Edmonds*  
*Indigenous Planning Studio*  
*December 2016*

## Summary

This fact sheet describes what community profiles are, why they are useful, and how to create them.

**Keywords:** communication tools, collecting data, analyzing data

## What is a Community Profile?

A community profile is a collection of information about your community. It describes your community's natural environment, land uses, economy, social, history, and cultural traditions. By doing so, it describes the needs, resources, and challenges of the community.<sup>1</sup> A community profile provides the background information needed for a planning process, such as a Community Plan. They are also used in different professions such as community economic development and natural resource management. A community profile is different from other informative community documents because it involves the community itself.

## Why Build a Community Profile?

You might build a community profile as part of a planning process or to communicate with government. Having a clear purpose for your community profile helps community members know what it can and cannot achieve.

If you are building a community profile as part of a planning process, first think about your community's goals, strengths, and struggles. Consider what residents envision for the community's future. Involving community members in the process grows their understanding of your community and teaches them new skills.<sup>2</sup>

For a more in-depth look at how a community profile is used in the planning process, see *Using a Community Profile*.

The community profile can also be used to show governments and agencies that the needs of your community that are not being met. Your community profile can also be a tool to show how a new project will impact the community and the quality of life of its residents. A community profile is also useful when applying for funding or service from government departments, agencies, or non-profit organizations.<sup>3</sup>

## How Do You Build a Community Profile?

### Themes of Information

Community profiles have information that can be placed into four broad groups or themes.



**Figure 1** | Themes of information in a community profile.

The first theme is the environment.<sup>4</sup> You can include knowledge about the natural environment in the community, such as the landscape, vegetation, wildlife, water, air quality, and climate. You can also include a description of the human environment, such as the community's land holdings, decisions or directions about land use, and a description of previous land uses. Transportation, water, wastewater, energy, and communications infrastructure are also included.

The second theme covers the social aspects of the community.<sup>5</sup> You can include your community's demographics, health and well-being, education, and governance. The health and well-being section covers any health issues in your community and describes the available physical and mental health resources. The education section captures the level of education achieved by community members, available education opportunities and resources, and community members' opinions. The governance and administration section summarizes government operations.

*demographics*  
the statistical characteristics of a human population, such as age or income

The third theme covers the community's culture. Knowing the culture of the community helps people understand the current situation and make informed decisions about the future.<sup>6</sup> This section includes the cultural practices, history, the use of Aboriginal languages, and sources of local knowledge.

The final theme is the community's economic profile, which outlines the current economic activities, businesses, and job data.<sup>7</sup>

## Sources of Information

Several sources of information are useful when creating a community profile. The first one is the community itself. Community members have a wealth of information about a variety of topics. They know the community's culture, history, lands, needs, and resources.

You can gather community knowledge in a variety of ways, one of which is with a community survey.<sup>8</sup> You can collect information such as community interests, and demographics. Another method to collect knowledge is by interviewing knowledge holders in the community. Similarly, you can use storytelling to gather information if your history is told orally. Finally, you can use photography and mapping to document your community's natural environment, human environment, and cultural sites.<sup>9</sup>

For a more in-depth look at how to do your own survey, see *Conducting a Community Survey and Analyzing Surveys*.

A second source of information is the Government of Canada's collection of data. Statistics Canada does a national census of the Canadian population every five years and collects a variety of data. While this provides a good source of data for some communities, it is only as good as the number of people who answered the questions and submitted the census. This source may not provide reliable data if participation was low, so compare it with sources of data before using it to make sure it is accurate. Indigenous and Northern Affairs Canada also collects data on Indigenous peoples but it has similar issues as census data.

The third data sources are your community's organizations. Your Band Office may have demographic data and your Health Centre may have health-related data. Your education department would have information on past and present students. If your community has an economic development corporation, it would hold data about the community's economy.

## Who is Involved in Building a Community Profile?

While a small group of people lead the profile's creation (likely the planning team), it is ultimately a document that describes your community as a whole. Therefore, it is ideal if all community members are involved in building the community profile at some point. Some members might have an ongoing interest in the process and are involved throughout. Others might have a limited interest and only be involved for a short period of time.

## When Do You Build a Community Profile?

It is not always the right time to begin to build a community profile. The Centre for Innovative & Entrepreneurial Leadership (CIEL) created a tool known as the Community Life Cycle Matrix that helps you find out where you are on the life cycle and identify what phase you are in.<sup>10</sup> Creating a community profile is best done in the Emergence or Vision Phase. If the community profile is being built as part of a community planning process, it is typically done so during the pre-planning phase or early in the planning phase.

## Final Thoughts

Gathering background information on your community is a critical step in the planning process, and a valuable process itself. At the same time, it can be a difficult and overwhelming task. This fact sheet, along with the additional resources listed below, helps guide your community through the process of building a community profile.



## Further Reading

### The Centre for Indigenous Environmental Resources (CIER)

CIER is a national, First Nations-directed non-profit organization that provides sustainable solutions to First Nations seeking to address environmental issues. It provides training materials for communities developing a Community Plan.

<http://www.yourcier.org/comprehensive-community-planning-training-program-materials.html>

### The Centre for First Nations Governance

This is a non-profit organization that seeks to support First Nations as they develop effective self-governance.

<http://fngovernance.org/>

### Statistics Canada

This is a federal government agency that collects statistics on the Canadian population. The data is searchable and can be limited by geographic area. The 2016 census data can be found at:

<http://www12.statcan.gc.ca/census-recensement/2016/rt-td/index-eng.cfm>

## Endnotes

- 1 Murray Hawtin & Janie Percy-Smith, *Community Profiling: A Practical Guide*. (2nd ed.) (Berkshire, England: Open University Press, 2007).
- 2 Murray Hawtin & Janie Percy-Smith, 2007.
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- 6 Centre for Indigenous Environmental Resources, 2008.
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- 10 Centre for Innovative & Entrepreneurial Leadership, "Communities Life Cycle Matrix," *Centre for First Nations Governance*, n.d., Accessed October 23, 2016, [http://fngovernance.org/resources\\_docs/Communities\\_Life\\_Cycle\\_Matrix.pdf](http://fngovernance.org/resources_docs/Communities_Life_Cycle_Matrix.pdf).

# USING A COMMUNITY PROFILE

by *Conor Smith*

*Indigenous Planning Studio*

*December 2016*

## Summary

This fact sheet provides information about using a community profile. It will introduce the what, why, how, who and when of this planning activity, as well as provide several additional resources making use of a community profile.

**Keywords:** communication tools, analyzing data, funding

## What is a Community Profile?

A community profile is a document with information about your community.<sup>1</sup> Topics can include the natural and built environment, society, culture, and economy.<sup>2</sup> Discuss priorities with community members to help you decide what is important to include in your profile.

Involving community members when creating your community profile is important. The document should be your community's story and told in a way they understand.<sup>3</sup> Ask people to think about their community, give their opinions about it, and imagine what changes they want to see. Your community profile is like a conversation with your community that shows where it stands, what its challenges are, and where it wants to go.



**Figure 1** | Themes of information in a community profile.

## Why use a Community Profile?

Community profiles can be used as starting points for more complex planning activity. They can be used for:<sup>4</sup>

- **Marking a reference point.** A community profile can compare conditions before and after a policy or program was implemented. They show how particular policies or programs are making a difference.
- **Initiating discussion on needs and priorities in the community.** Discuss challenges and ideas for the future with community members. Next, think about any common patterns and themes people talked about. Arrange them in order of importance or feasibility.
- **Using local knowledge.** Your community's policies and programs should always strive to match its way of life. A community profile that uses traditional knowledge and practice can make initiatives more compatible, useful, and valuable to the community.
- **Fact-based policy and practice.** Sometimes, it can be useful to have demographic, statistical, or community engagement data to back up a claim that there is a problem or opportunity. This might be used to win political support in a community or to support a funding application.

See the *Creating a Community Profile* fact sheet for information about the process of building a profile for your community.

## How are Community Profiles Used in Planning?

### What is Needed to Use a Community Profile?

#### Resources and Tools

- Community engagement and traditional knowledge are examples of research you can do yourself.
- Demographics and statistics are examples of research someone else has done that you use.
- Maps can be helpful to understand a problem or opportunity in context.
- Knowledge of current community resources, funding opportunities, staff, and local initiatives

#### Skills

- Good analytical skills
- Organizational skills
- Critical thinking
- Ability to prioritize<sup>5</sup>

### What are the Steps to Use a Community Profile?<sup>6</sup>

- 1. Scan and identify:** Scan the community profile to identify patterns, themes, and linkages. As a member of the community, many of these will be obvious to you. Others will be easier to identify after engagement with the community or by using statistics and demographic information. It can be useful at this stage to conduct a SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis.<sup>7</sup>

- 2. Frame a problem or opportunity:** State the issue neutrally without suggesting a solution or placing blame. It is important to approach a situation without assumptions. This can help when trying to get people to agree when discussing a touchy topic.
- 3. Identify the driving forces:** Causes are often very difficult to identify because problems are complex. It is important to think about a problem and ask questions. Try the following steps:
  - a. Stating the problem
  - b. Asking “why?” and thinking of a possible answer.
  - c. Doing research
  - d. Answering the question
  - e. Repeat steps b through d until satisfied
- 4. Identify other factors that are linked to the problem or opportunity:** The challenges and opportunities in communities are always connected. Try to think about how one topic could affect or be affected by the other sections of the community profile.
- 5. Look to the Future:** Analyze the topics with the future in mind. There are a variety of techniques that can be used to think about an issue moving 5, 10, or 20 years into the future. They focus on what might happen if nothing is done about a certain issue. This helps identify the driving forces behind an issue.
- 6. Plan for Change:** The planning stage often involves bringing the community together to create a vision, goals, objectives, and strategies for the future.

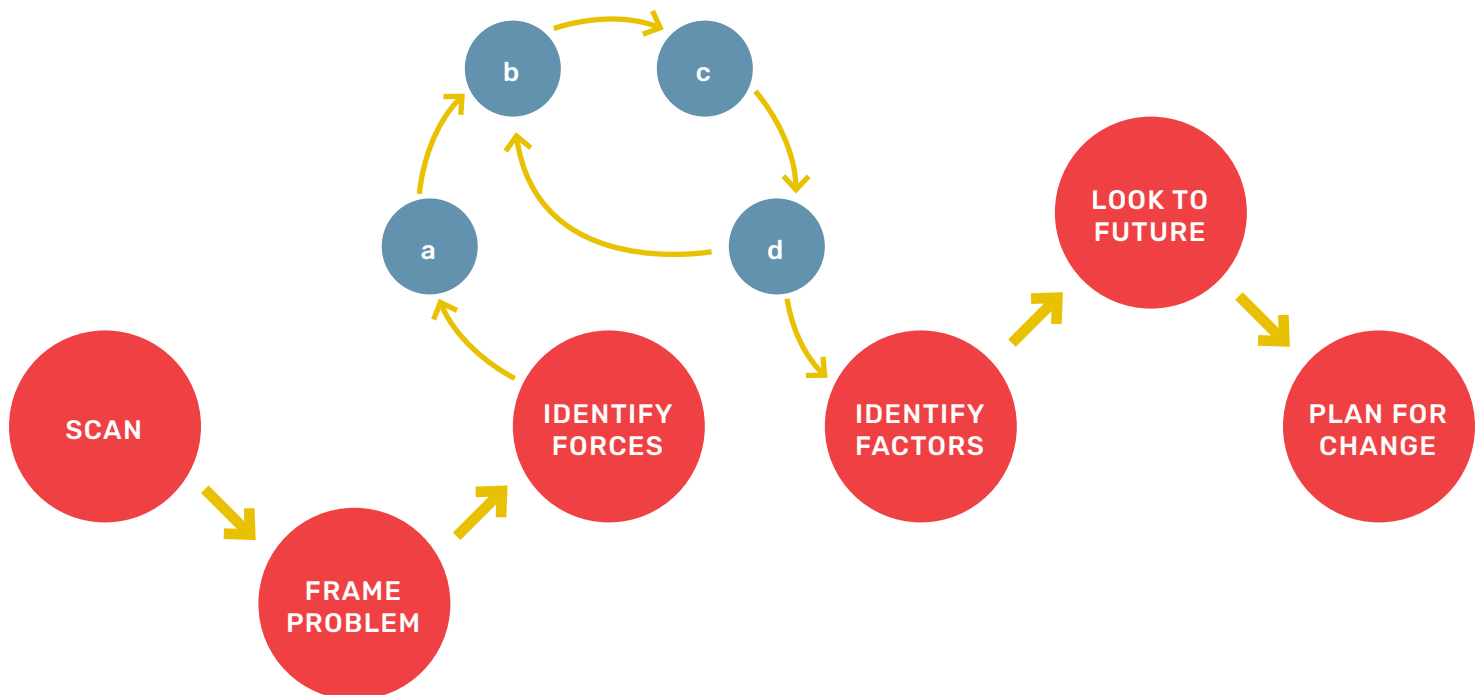


Figure 2 | Steps to use a community profile.

## Example Community Profile Usage

The following example follows Jolene as she moves through the steps outlined above in the use of a community profile. Please bear in mind that this is just a simple example used to illustrate the process of using a community profile – each step is much more complex in practice!

- 1. Scan and Identify:** Jolene has a completed community profile and has begun to look for patterns, themes, and linkages. She found a passage in the community engagement section that explained that housing was very crowded in the area. She knew from experience that extended families often lived in small houses. She double-checked the demographic information in community profile, and it showed that there were an average of 7 people per household. She had identified a challenge facing her community.
- 2. Frame a problem or opportunity:** Jolene framed the challenge by stating simply: “There is not enough housing in the community.”
- 3. Identify the driving forces:** Jolene began to think about what might be causing this situation. She came up with the following thought process:
  - There is not enough housing.
  - Why? – Because too many people are being born in the community.
  - She looks through the community profile to find out about the population growth rate. She discovers that the on-reserve population is growing at a rate of about 1% per year. This is not very high.
  - Why else? – She continues researching and finds that the housing stock has stayed the same for a very long time. There aren't enough houses being built!
- 4. Identify other factors that are linked to the problem or opportunity:** Jolene looks through the community profile and begins to reflect on the natural environment in the community. She realizes that drainage is a major problem, leaving much of the reserve's territory partially flooded at certain times of year. She realizes that a shortage of buildable land might be contributing to the housing shortage because there are no new areas to build.
- 5. Looking to the Future:** Jolene uses a population projection to show how large the population will be in 15 years. She finds out that the housing problem is only going to get worse if there aren't more houses built. She uses a scenario exercise to show what will happen if:
  - nothing changes
  - the community increases the density of housing by building new houses closer together, or by building higher density buildings
  - the community clears land with drainage solutions to make room for new neighbourhoods
- 6. Plan for Change:** Jolene sets out to begin developing plans, engaging the community, and developing a strategy to alleviate the community's housing shortage.

## Who can use a Community Profile?

Anyone! Community profiles are a reflection of the community. It contains a story about where it has been and where it is today. Leaders (elected or unelected) and planning champions are important in planning because they can help to unite community members.<sup>8</sup> If you are unfamiliar with planning, a community profile is a great way to learn new things about your community, to see things differently, and to start thinking about the future.

## When Should Community Profiles be Used?

Community profiles are usually used in the early planning stages of community development. Before using a community profile, make sure your community has a desire

to plan for its future, can achieve some level of consensus, understands the value of visioning and planning, and has the resources it needs to move forward. That being said, even when communities are conflicted or troubled in some way, community profiles can be useful tools that help show common concerns and shared stakes in the future.<sup>9</sup>

## Final Thoughts

A community profile is a useful tool that outlines a wide range of information related to a community's current status and resources. It is useful to identify needs and opportunities for the future, provide evidence, establish baselines, or use local knowledge. Using a community profile doesn't take a lot of resources or special skills, but it takes time and effort to use meaningfully. They are an important stepping stone on the way to developing plans for the future.

## Further Reading

### The Community Tool Box

This resource has extensive information pertaining to general community planning. It provides step-by-step guides organized into chapters that match the phases of planning, and offers a wealth of tools and resources to achieve them. Though it is not specifically tailored to Indigenous communities, it is sensitive to the notion that every community will have different values and goals.

<http://ctb.ku.edu/en/table-of-contents/assessment/assessing-community-needs-and-resources/analyzing-community-problems/main>

### Our Community Story: An Annotated Table of Content Planning Tool

This document is a template for a community profile report. Each section contains text that explains the specific activity to undertake, and the kinds of tools required. Though it is specifically tailored to Indigenous communities, it should not be understood as the only structure necessary. As a guide, it can be useful to help communities ensure that they have covered all of the central parts of community profiling.

[http://www.yourcier.org/uploads/2/5/6/1/25611440/ccp\\_training\\_session\\_2\\_-\\_our\\_community\\_story.pdf](http://www.yourcier.org/uploads/2/5/6/1/25611440/ccp_training_session_2_-_our_community_story.pdf)

### Community Profiling: A Practical Guide

This book is an excellent in-depth guide to the community profiling process. In addition to the other resources mentioned in this fact sheet, it can fill in the gaps in knowledge by providing additional background, theory, and tools for undertaking the community profile.

Murray Hawtin & Janie Percy-Smith, *Community Profiling: A Practical Guide*. (2nd ed.) (Berkshire, England: Open University Press, 2007).

## Endnotes

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- 2 Indigenous and Northern Affairs Canada, "CCP Handbook: Comprehensive Community Planning for First Nations in British Columbia, Third Edition," *Indigenous and Northern Affairs Canada*, 2013, Accessed October 24, 2016, [http://www.aadnc-aandc.gc.ca/DAM/DAM-INTER-BC/STAGING/texte-text/ccphb2013\\_1378922610124\\_eng.pdf](http://www.aadnc-aandc.gc.ca/DAM/DAM-INTER-BC/STAGING/texte-text/ccphb2013_1378922610124_eng.pdf), p. 2-9.
- 3 Centre for Indigenous Environmental Resources, "Our Community Story: An Annotated Table of Content Planning Tool," *Centre for Indigenous Environmental Resources*, 2008, Accessed October 22, 2016, [http://www.yourcier.org/uploads/2/5/6/1/25611440/ccp\\_training\\_session\\_2\\_-\\_our\\_community\\_story.pdf](http://www.yourcier.org/uploads/2/5/6/1/25611440/ccp_training_session_2_-_our_community_story.pdf), p. 1.
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- 8 Indigenous Affairs and Northern Development Canada, 2006, p. 66.
- 9 Indigenous Affairs and Northern Development Canada, 2006, p. 66.





# CONDUCTING ARCHIVAL RESEARCH

by *Olivia Michalczuk*  
*Indigenous Planning Studio*  
*April 2018*

## Summary

This fact sheet explains what archival research is, how to do archival research, when you should do it, and why it is important to the plan.

**Keywords:** collecting data, managing / storing data, analyzing data, building capacity

## Why Conduct Archival Research?

Many communities find that they need to know where they have been in order to plan where they are going. Researching your past can help you make informed decisions<sup>1</sup> in the present and create goals for your future. This research can act as a good foundation before you move forward.

History and background information are important to include in your plan. This information often serves as the groundwork for your planning process. Researching can help you learn from the past as you make decisions in the present. Doing thorough research helps you make decisions based on facts and evidence.

There is often a lot of research to do, but often the best way to get started is to look at what is already available. This way, you aren't doing extra research that has already been done.

Archives contain lots of information and even though it takes time to get through all the information available, it will save time and money in the future.

## What is an Archive?

An archive is like a library for important documents but the main differences between a library and an archive are:

- Libraries hold items that have many copies, but archives usually hold the only or original copy of an item.
- You can borrow things from a library but you aren't allowed to borrow them from the archives.
- Libraries usually hold books and news articles, but archives hold documents and files.

Archives collect the original copy of different types of documents. They often have documents, reports, governmental files, manuscripts, letters, photographs, moving images, audio recordings, artwork, books, diaries, artifacts, and more. Often, these documents cannot be found anywhere else in the world.

When you go to the archives, you can search through, look at, and sometimes copy documents. Be sure plan ahead so you know how to use the archives and what you are looking for before you go.<sup>2</sup>



**Figure 1 |** A corridor of files at the National Archives

Source (The National Archives UK. "A corridor of files at the National Archives." Digital image. Wikimedia Commons. August 15, 2011. Accessed February 28, 2018. [https://commons.wikimedia.org/wiki/File:A\\_corridor\\_of\\_files\\_at\\_The\\_National\\_Archives.jpg](https://commons.wikimedia.org/wiki/File:A_corridor_of_files_at_The_National_Archives.jpg).

## When is Archival Research Done?

Research is part of the pre-planning stage. According to the CCP Handbook, research is the fourth step in the pre-planning phase:<sup>3</sup>

1. Assess community readiness
2. Develop a budget, identify funding
3. Build a planning team
- 4. Research**
5. Build a work plan

## What Types of Information Are There?

Research helps make sure that your plan is relevant to the community and helps ensure a successful planning process. According to the CCP Worksheet, *Gathering Background Information*, there are two types of information: internal research and external research.<sup>4</sup>

Internal research is information that already exists in the community. This may include existing reports in the Band or Administrative offices that are done by consultants or the First Nation. Maps, plans, and information from community members might be of interest.

Archival research is considered external research on the CCP website. To find external information you have to ask: Who else might have some information that is useful? From there you can start looking at places like:

- Federal government departments
- Provincial / Territorial governments
- Neighbouring cities / municipalities
- Forestry / mining / fisheries / other companies
- Archival resources

## Who is Involved in Archival Research?

Before conducting research, you should talk to your planning team. If you know what you are looking for, it is much easier to find it. Brainstorm some information that would be helpful to making a better plan.

You can also involve community members and Elders who know some historical information about your community. Their memories can help you figure out what events or topics need more research. Next, you can create some questions and research topics. These can be based on ideas from your planning team and information from community members.

When you phone the archives to make an appointment, you will speak to an archivist who is there to help you find what you are looking for. They will usually prepare some materials for you to look at when you arrive. They are there to help you find what you are looking for and are available to help answer any questions you have about the material. They can also help you make copies of the information if that is allowed.

## How do You Conduct Archival Research?

There are two ways to conduct archival research. One way is to go to the actual building where the files are kept. The second way to conduct archival research is online, because lots of archived material is scanned and put on their websites.



### Physical Archives

The City of Winnipeg's website suggests following a few before visiting a physical archive building:<sup>5</sup>

#### 1 Get to Know Your Topic

Before you go to the archives, see if the information is already available at public libraries, research libraries, or on the internet. Get to know as much as you can about your topic so you know the gaps you need to fill when you get there.

#### 2 Formulate Your Questions

Try to know exactly what you are looking for before you go. Try to have some questions ready and some goals for your visit.

#### 3 Discuss Your Topic With Archive Staff

Call the archives for an appointment and let them know what you are looking for. That way, when you get there they can have some materials for you to look at and give you an estimate of how much time it will take.

#### 4 Allow Enough Time

Archival research can take a lot of time if you keep finding more information. Block off lots of for your visit or visits so you have time to look through everything that might be helpful.



### Online Archives

To conduct archival research online, you need to know a little bit of background information and keywords to search for.

Use important keywords like the name of your community, previous names of the community, and important people who live in the community. Once you have some keywords, questions, or know what information is missing, then you can start searching on websites like [Library and Archives Canada](#). There are a lot of resources and people available to help you get what you need in this stage of planning, it just takes some work and asking the right questions.

## Final Thoughts

Conducting archival research may seem like a lot of work, but it is worth it in the end to find all the information that you can. Research is like following a treasure map, with clues that lead you down different paths where you find wealths of

information. Good research takes a look at where you have been, giving your plan meaning and your community a strong base to move forward.

## Further Reading

### Archives and Records Control by City of Winnipeg

This website has lots of information on archives in Winnipeg and how to conduct archival research. There are available online search options as well as who you should call in Winnipeg if you want to make an appointment at the archives. If you are not from Manitoba, there are still useful tips on how to conduct archival research in general.

<http://www.winnipeg.ca/clerks/toc/archives.stm>

### Library and Archives Canada by Government of Canada

By clicking on your province, you will find a list of resources that includes all types of information that may be helpful in your project. It also links you to other websites where you can conduct searches. This is a very good external resource to get started.

<http://www.bac-lac.gc.ca/eng/discover/genealogy/places/Pages/manitoba.aspx>

### Upper Right Limb: Taking a Look & Determining Where the Community is At by Darrell Phillips and Wanda Phillips-Beck

The Community History section has tips to help you gather historical information from your community and inform your questions before beginning your research.

<https://www.publicsafety.gc.ca/cnt/rsrscs/pblctns/mvng-twrd-strngr-ftr/index-en.aspx#a13>

## Endnotes

- 1 Aboriginal Affairs and Northern Development Canada, "CCP Handbook: Comprehensive Community Planning for First Nations in British Columbia, Second Edition," *Aboriginal Affairs and Northern Development Canada*, 2010, <https://www.aadnc-aandc.gc.ca/eng/1377629855838/1377632394645#pre>.
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# COMMUNICATING IDEAS USING VISUAL AIDS

by **Dan Iskierski**  
Indigenous Planning Studio  
January 2020

## Summary

Effective communication can mean the difference between a good idea and a failed plan. The information needs to have a long-lasting impact on its audience. Studies have demonstrated the power of the human brain to interpret visual information faster than listening or reading. Visual aids are an important tool for helping people grasp information quickly and effectively.<sup>1</sup>

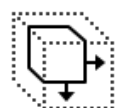
**Keywords:** community engagement, communication tools, reporting back, youth, planning team

## What Are Visual Aids?

Visual aids represent an idea, concept or information through two-dimensional visual means. Some examples of visual aids are objects or models, photographs, diagrams, sketches, video or infographics like maps, tables, charts or graphs.

For more information on videos, see the *Using Videos for Plan Implementation* fact sheet.

### Examples of visual aids



Models



Sketches



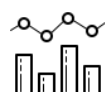
Pictures



Maps



Graphs



Charts

## How Do Visual Aids Help Communicate Ideas?

Visual communication can play a powerful role in sharing information or concepts. Visual aids can enhance presentation, aid in memorization, concentrate the audience on an idea and avoid distraction, and provide a form of repetition that provides clarity.<sup>2</sup>

Visual aids can be a photograph of the subject matter or even a diagram or sketch. When discussing complicated information, visual aids can explain the concept in smaller parts that gradually build the bigger picture.

*The use of visual aids will make the information being presented more interesting and attractive to the audience which helps focus their attention.*

## How Do Visual Aids Relay Information to the Audience?

Humans are attracted to physical representations of ideas like pictures, shapes or colourful imagery. The use of visual aids will make the information being presented more interesting and attractive to the audience which helps focus their attention. Visual aids can also reinforce the text or information to help the audience remember. You can think of them as a form of repetition that solidifies the information into the minds of the audience.<sup>3</sup>

**Figure 1 | Visual Aids**

Adapted from (Icons8 LLC. 2020. Free Design Resources and Software. 2020. Accessed January 16, 2020 from <https://icons8.com>.)

## Which Audiences Should Be Included?

When communicating information to the community it is important to consider a wide range of audiences. Members of any community are diverse in age, gender, familial & societal roles and learning preferences. For this reason, choosing multiple visual aids to demonstrate the same idea may be beneficial. Continual feedback during community events and presentations will ensure that appropriate visual aids are being used.

## How Do You Use Colours and Fonts?

The design of any visual communication affects how we perceive its value. Advertisers have known this for a long time. Consider the power of packaging, labelling, logos and general marketing. The choice of font and colour is part of the communications strategy.<sup>4</sup>

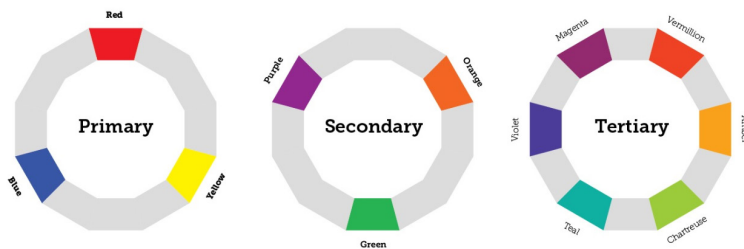
Colour psychology is a part of daily life. Just think of traffic lights. Green means go! In Disney films black is a colour associated with villains whereas blue or green was worn by heroines and heroes, creating positive associations.<sup>5</sup>

There are many trends in colour selection which can be difficult to keep up with. The colour wheel can help to understand primary, secondary and tertiary colours. This then informs how colours can work together.

### The Colour Wheel

Understanding the colour wheel is helpful for understanding how to harness the power of colour in communication. Specifically, colour can be useful to:

1. Create contrast by making an object stand out against its surroundings.
2. Complement information with a similar colour.
3. Group 2 things by using different colours.
4. Create a sense of amounts by contrasting colour with size differences.<sup>7</sup>

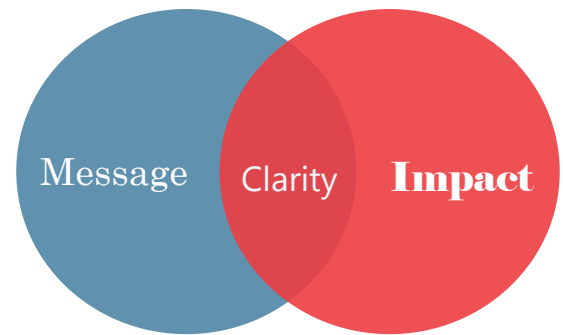


**Figure 2 | Primary, secondary and tertiary colours of the colour wheel.**  
Source (Nediger, Midori. "Colour Wheel". Digital Image. *Vennage.com*. How to Pick Colors to Captivate Readers and Communicate Effectively. February 1, 2018. Accessed November 15, 2019 from <https://vennage.com/blog/how-to-pick-colors/>)

## Fonts

Fonts can have a similar impact as they carry visual messages. Some are meant for easy reading whereas others may be intentionally strange for specific purposes like Halloween. There are decorative fonts and ones intended to emphasize a headline.<sup>8</sup>

Choosing the right font is important. Fonts should be legible and readable which means that the letters need to be easily identified and the words spaced properly. This makes it easier to read the text. The size and type of font, including boldness, can help make headings and main points stick out. This creates a visual hierarchy through choice of font and its size or relative thickness.<sup>9</sup>



**Figure 3 | Striking the balance.**

Here are five steps to selecting the right font for your message:

1. **Think About Your Content**
  - a. What is the purpose of the material?
  - b. What is the length and structure of the text?
  - c. Where will the information be presented? Report? Poster? Presentation?
2. **Choose a Body Font That Is Readable**
3. **Choose a Few Header Fonts That Add Some Style**
  - a. How can the header add more character and draw the reader's attention?
4. **Find a Header Font That Pairs With Your Body Font**
  - a. Are the fonts similar enough to remain consistent?
  - b. Are the fonts different enough to create an appropriate contrast?
5. **Create Visual Hierarchy By Varying Size and Weight**
  - a. Is your font large enough to read at arm's length?
  - b. Does your font overwhelm the page?
  - c. Could the use of bold or italics add some pizzazz?<sup>10</sup>



## What Are Infographics?

An infographic is a combination of information supported by graphics. That simple, or is it? The main concept is rather easy: written or numerical information is presented and supported with visual elements that support the information. There are many different types that can be used, and each will depend on the information that is being presented.

The eight most popular types of infographics are:

1. Statistical infographics present numerical values using fonts, icons or charts.
2. Informational infographics present written information but within sections for easy reading.
3. Timeline infographics highlight important dates with emphasizing icons, photos or labels.
4. Process infographics highlight steps that illustrate how a process works.
5. Geographic infographics use maps to represent location-based data or compare regions.
6. Comparison infographics provide unbiased information about two or more things to compare.
7. Hierarchical infographics use space, flows or sections to show order of importance or command.
8. List infographics use numbers, icons, bullets or flows to display generally related information.<sup>11</sup>

## What Is a Pictogram?

Pictograms repeat icons in a single line or grid. Each icon will have a numerical value that can be determined as needed and should be communicated on the pictogram. The main purpose is to make data more exciting and easier to remember. Some examples of using pictograms are when visually showing ratings or scores, a project status update, tallied information or instead of a bar chart.<sup>12</sup>

Pictograms are great to use when the information is text or number heavy because they break up the information with easier to digest icons that leave a lasting visual impact.

### General Rules for Selecting Pictograms

1. Use simple yet meaningful icons that are easily recognizable.
2. Use shades of the same colour rather than different colours to show proportions or percentages.
3. Maintain rows with commonly used numbers like five or ten for easy reading.<sup>13</sup>

## What Are Charts?

When communicating information visually, charts are often used to separate information into parts that are easier to read and understand. Charts can be a form of infographic when they combine data, text and visuals to help explain complex concepts, strengthen the information and make it memorable.<sup>14</sup>

### Selecting the Right Chart

The first step is to determine what the information is trying to visually suggest. Will it inform, compare, show change, organize or show a relationship between information?<sup>15</sup>

The following are examples of how to communicate various information using different charts:

1. **Inform:** Icon charts use large and bold font to display information.
2. **Compare:** Bar/column or bubble charts use length or size to show differences and pie charts compare individual parts to a whole.
3. **Change:** Line or area charts show change over time.
4. **Organize:** Table charts use sections to organize information in columns or rows.
5. **Relationships:** Scatter plot charts show the distribution and relationship between data sets.<sup>16</sup>



**Figure 4 | Selecting the right chart.**  
Source (Nediger, Midori. "Chart Selection." *Vennage*. How to Choose the Right Charts for Your Infographic. May 15, 2019. Accessed November 15, 2019 from <https://venngage.com/blog/how-to-choose-the-best-charts-for-your-infographic/>)

## Final Thoughts

These are just some of the many ways to use visual aids to display information. Visual aids help simplify information through hierarchy and separation while making it interesting for the audience to engage with. These simple approaches help to communicate ideas effectively and make them more memorable. There are many more options out there. See the reference list for additional resources. Also, be creative and invent ones that works best for your situation.



## Further Reading

### **How to Use Visual Communication and Why it Matters** by Allison Boatman

The article explains the effectiveness of using visual aids to improve comprehension and retention, in plain language. There are practical examples included which show how these tactics are effective.

<https://www.techsmith.com/blog/why-visual-communication-matters/>

### **15+ Beginner-Friendly List Infographics Templates** by Sara McGuire

These are great resources that are free to use and will either provide useful templates or offer some ideas. In addition, the website is user friendly and has other links to even more resources.

<https://venngage.com/blog/infographic-templates-free/>

### **Comprehensive Community Planning Training Program Materials** by Centre for Indigenous Environmental Resources

As part of the training program materials there are numerous other resources for communicating information effectively. Some examples are the use of word clouds or the sustainability wheel. There is also a communication strategy template that could be applied to multiple situations.

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# CONDUCTING A SWOT ANALYSIS

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## Summary

This fact sheet explains the importance of monitoring the successes and challenges of your community in achieving their goals. This fact sheet will provide tools your community can use in assessing the effectiveness of your plans.

**Keywords:** community engagement, communication tools, collecting data, analyzing data

## What Is a SWOT Analysis?

A SWOT analysis is an easy-to-use monitoring tool for understanding any problem, project or issue related to decision-making and planning in your community. SWOT stands for strengths, weaknesses, opportunities and threats. It can be used to monitor and assess the performance of many aspects of your community, such as internal policies, financial management, community projects and your community's representative structure.<sup>1</sup>

A SWOT analysis can help you with the risk assessment of any project, as well as determine which plans are working well for your community, and which ones are not. A SWOT analysis is a good tool to use when your community needs to evaluate

and determine where possible changes need to be made, as well as where potential opportunities may be.

## Why Should You Do a SWOT Analysis?

It is important to regularly conduct a SWOT analysis to make sure the plans for your community are on track and effective, and if they aren't, how they be adapted and changed to ensure your goal is reached. A SWOT analysis should first be used during the pre-planning stage, however, it can also be used during all other stages of planning.

**Table 1** | Key terms and definitions.

	Definition
Strengths	Things your community does well and that set you apart. Examples include highly motivated and passionate staff, or access to natural resources.
Weaknesses	These are things your community could improve on and things your community should avoid. Examples include employment and resource barriers or lack of policy.
Opportunities	These may include things your community could use to their advantage, such as potential partnerships or seasonal opportunities.
Threats	These are factors that could negatively affect your community or projects you are working on.

There are many factors that will come up throughout the planning process that could make it hard to compete a project. A SWOT analysis will help you consider all the effects these factors may have, and help you formulate a plan to move forward. Performing a SWOT analysis as often as every 6 months will ensure that you're not caught off guard by any internal or external factors.

*Performing a SWOT analysis as often as every 6 months will make sure you're not caught off guard by any internal or external factors*

Conducting a SWOT analysis can help your community develop a

framework for measuring the performance of the plans your community has implemented.

### A SWOT Analysis Can:

- Focus on community goals;
- Monitor progress towards goals;
- Identify opportunities for making improvements; and,
- Report to First Nation members on the results achieved.

#### Internal Factors

Influences originating within your community that could impact your planning process, such as:

#### Community Capacity

Some communities have more resources than others. This could include available staff or volunteers or the tools necessary for completing a job, such as a computer and software systems.

#### Natural Resources

The success of a plan can be dependent on resources such as land. It is important to ensure the land you have in your community is usable for the intended project.

#### External Factors

Influences originating outside your community that could impact the progress of the project, such as:

#### Financial Resources

Available funding can control when a project can start.

## Who Should Lead the SWOT Analysis?

A SWOT analysis is a planning tool that should include Chief and Council, all employees of the community who are working on any projects, as well as community members working towards the objectives. Having many employees and

members of the community participate in the SWOT analysis will ensure that multiple perspectives are included. With more people involved in the SWOT analysis, the chance of overlooking important factors that could potentially impact the success of the project is less likely.

One of the benefits of a SWOT is that it can be used to assess many important planning areas such as governance, lands and resources, health, social, culture economy and infrastructure and development.<sup>2</sup>

For more information on monitoring strategies, see the *Monitoring Your Progress* fact sheet.

## How Do You Lead a SWOT Analysis?

The SWOT analysis is a starting point and should be used alongside other strategies in order to get a comprehensive understanding of the state of your community. One of the benefits of doing a SWOT analysis is that it requires few tools. You can perform a SWOT analysis with a large piece of paper (as shown in Figure 1), if that isn't available you can also use a chalk board, white board or individual index cards. You will also need pens and markers.



**Figure 1 | Strategy workshop.**

Source/Adapted from (Olimar. "Strategy workshop 2018." Digital image. Wikimedia Commons March 4, 2018. Accessed January 27, 2020. [https://commons.wikimedia.org/wiki/File:SWOT-analysis\\_at\\_Wikimedia\\_Suomi\\_strategy\\_workshop\\_2018\\_08.jpg](https://commons.wikimedia.org/wiki/File:SWOT-analysis_at_Wikimedia_Suomi_strategy_workshop_2018_08.jpg))

Draw out a grid with four quadrants on whatever you are using. If you are using index cards, use one index card for each letter of the SWOT analysis. If you are using a large piece of paper, a chalk board or a white board, strengths should be in the upper left corner, weaknesses in the upper right, opportunities in the bottom left and threats in the bottom right. Try to think of both internal factors and external factors that are affecting or may affect your community.

One way to approach a SWOT analysis is to conduct a workshop and have staff and community members brainstorm ideas to help build a list of goals you would like to see your community achieve. With this list, you can then determine the strengths, weaknesses, opportunities and threats for each goal and start ranking which ones you feel are most important.

A helpful tip is to look at the weaknesses you've identified and see how these are related to the threats you've identified. This way, you can determine if any of them are caused by something that can be changed in the community or in the goals you've set out. Try to link the strengths you've identified to ways you can combat any threats to your community plans. Also, it is helpful to think about if there are any time

constraints that could impact your opportunities, such as seasonal constraints. If this is the case, perhaps those opportunities can take priority.

## Final Thoughts

In summary, performing a SWOT analysis will help your community identify the areas of your project and plans that are strong, as well as which ones could use more work. Additionally, a SWOT analysis will help you identify opportunities that are unique to your community. A SWOT analysis is a handy tool for avoiding any disruptions to your plans, but it is most effective when used in partnership with other strategies.

## Further Reading

**Indigenous Governance Toolkit** by The Australian Indigenous Governance Institute

This toolkit is a useful online resource which provides information and case studies on a variety of topics such as governance, rules and policies and management and staff.

<https://toolkit.aigi.com.au>

**Moving Toward a Stronger Future: An Aboriginal Resource Guide for Community Development** by Department of Public Safety and Emergency Preparedness

This guide provides information on topics related to community development, such as creating a community vision, engaging the community and team building/ working collaboratively.

<https://www.publicsafety.gc.ca/cnt/rsrscs/pblctns/mvng-twrd-strngr-ftr/mvng-twrd-strngr-ftr-en.pdf>

## Endnotes

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