

# 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 a 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>

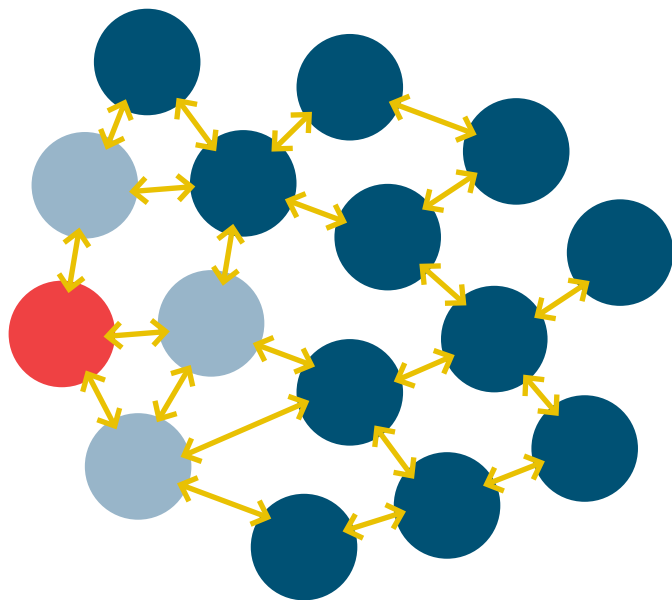
- Design and facilitate community engagements
- Gather community background information & research
- Compile and analyse results from community engagement and surveys
- Help communicate results to the community
- Create maps of the community & region
- Create action plans
- Help create vision statement
- 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/Bkbbu0dX06A>.)

## 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>

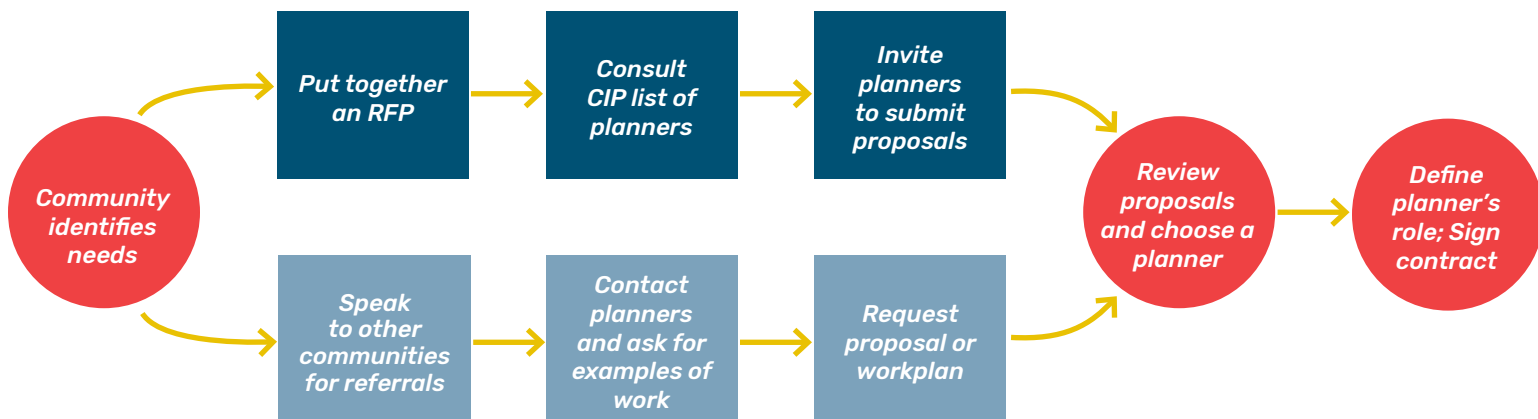


Figure 4 | Choosing a planner can be done through RFP (top) or referral (bottom). The circles represent steps common to both approaches.

### 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.

#### 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.

<p><b>competent</b> having necessary ability, knowledge or skill to do something successfully</p>
<p><b>integrity</b> being honest, and having moral principles</p>

### 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 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

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- 10 Indigenous Corporate Training Inc., "12 Common Mistakes in First Nation Consultation," *Indigenous Corporate Training Inc.*, n.d., Accessed November 20, 2017, <https://www.ictinc.ca/blog/12-common-mistakes-in-first-nation-consultation>.
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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.