Course Number | PLAN 532
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Course Credit(s) | 3.0
Course Title | Strategic Planning: Developing and Implementing Policy
Term | 2018-2019 Winter Term 2
Dates/Day/Time | Friday

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**Short Course Description**

**Course Description**
The first half of the course introduces the theory and practice of developing and implementing strategic/policy plans using examples from metropolitan, city, and neighbourhood plans. A range of topics including land use, transportation, environment, economic, social, and financial directions are combined into integrated plans for sustainable futures. The course considers the challenges and opportunities of engaging broad public participation in plan preparation and implementation. **Assignment 1** provides an opportunity to compare strategic plans.

The second half of the course explores techniques for writing and managing plans both at the city and regional-metropolitan levels. Classes will introduce example plan making under various governance systems including the challenge of integrating new issues such as resilience into established plans. **Assignment 2** provides an opportunity to prepare a report to a local Council recommending a process to prepare a new policy plan or update an existing official community plan.

**Learning Objectives**
By the end of this course students will be able to understand methodologies for analysis, preparation, and implementation of strategic/policy plans in Canadian and international contexts; recognize appropriate tools for plan making including the use of ‘original’ and ‘borrowed’ research and onsite and online stakeholder involvement; learn to write and present policy reports to elected officials, and understand the context for considering the roles of politicians, planners, various levels of government, private sector, NGOs, and citizens in planning sustainable futures.
Course Organization
Course Requirements and Grading
The course is graded on a numeric (percentage) basis with the usual graduate standards applied:
40% Assignment 1: Written Report and Class Presentation
40% Assignment 2: Written Report, Report Review, and Group Discussion
20% Participation in class discussions based upon weekly readings

For Assignments 1 and 2 you will be judged on your ability to identify, compare, and present (both written and verbal) strategic planning issues and associated policies. Assignment 1 should demonstrate your ability to compare and critique different approaches to policy planning. Assignment 2 should demonstrate your capacity to provide practical policy advice in a format which can be used by a municipal council. Class participation should demonstrate your grasp of weekly readings, your critical assessment of plan making approaches, and your contribution to discussions of improved planning approaches to address current and future issues.

The two assignments are:

1. Comparative Plan Assessment:
   - Select an issue/topic typically covered in a city or regional strategic plan and research two Strategic Plans/Official Community Plans (from locations outside Metro Vancouver) to compare similar/different approaches to addressing your issue/topic.
   - Identify an interesting approach taken by one (or both) plans which you think your colleagues would benefit from hearing about. Prepare a 5 – 10 minute presentation on your findings.
   - Prepare a brief report (5 pages) which illustrates what you think are good (or poor) examples of how the two reports/plans addressed your topic.

2. Policy Report Preparation
   Select a Metro Vancouver municipality and prepare a report (maximum ten pages) to your Municipal Council proposing a process to update or amplify a section of their Municipal Official Community Plan.
   The report should be written in “Council Report Format” providing:
   1. Recommendations
   2. Executive Summary/Purpose
   3. Background: Existing policy context (e.g. Regional Growth Strategy and Municipal OCP)
   4. Discussion
      - Provide the rationale for updating the selected section of your municipal OCP
      - Present options for a process to update the OCP
      - Provide justification/rationale for your recommended process
   5. Conclusion/Next Steps

Report Review & Discussion
- Discuss your proposed process, recommendations, and learnings from the
assignment. Format will be a round table discussion of key points (not an individual presentation).
- Review a colleague’s draft report and provide advice.

**Course Materials**
There is no prescribed text. Web accessible readings will be identified weekly.

Other example references:

**Computer/USB Flash:**
All Class presentations will be available to upload.

**Classes 2018**
1. **Introduction to Strategic Planning: January 5**
What is “Strategic Planning?” The challenge of combining land use, transportation, social, environmental, and economic directions into a Sustainable Strategic Plans. Example Official Community Plans and Municipal Business Plans. Course overview and assignments.

2. **Approaches to Strategic Planning: January 12**
Strategic Planning process from Visions to Monitoring. Comparison of Traditional Strategic Planning Methodologies (SWOT) and Choosing Methodologies. Discussion of sustainability as an organizing framework.

3. **Case Study: CityPlan Engaging People in Policy Planning: January 19**
Planning to plan--agreeing roles and responsibilities, public engagement techniques, maintaining momentum. Integrating social media tools into plan making.

4. **Moving From Plans to Action: January 26**
Developing detailed policy plans from Strategic Directions. Contribution of original research and ‘borrowed’ policy. Roles of council, staff, task forces, and community in plan making and implementation. Example case studies: Housing, Industry, Transportation, and Financing Growth.

5. **Assignment 1 Workshop on Comparative Strategic Planning: February 2**
Students lead discussions sharing information from Plan reviews.

6. **Writing Policy Planning Reports: February 9**
The challenges of assembling strategic directions, conveying options, and framing recommendations for a Council or Board. Presenting and responding to decision makers and the press. Example reports illustrate how to present complex policy issues, reframe existing policies, deal with legal challenges, anticipate new directions, and handle "unpleasant realities".
7. Developing Regional-Metropolitan Plans: February 16 Field Trip to Metro Vancouver to be confirmed.
Experience the planner-public-politician interface in the context of coordinating “multi-jurisdiction” plans. 4330 Kingsway, Burnaby. Board meeting starts at 9 am 2nd Floor.

February 23: Mid-Term Break
March 2 Date to be confirmed: SCARP Student Symposium: No Class

8. Managing and Monitoring Plans: March 9
Managing multi-department/inter-agency plans is complex. This session introduces tasks to consider when proposing a policy planning process (e.g. Assignment 2) including management structures, techniques for work programming, budgeting, phasing, funding, and monitoring.

9. Applying Canadian Processes to International Applications: March 16
Session on International Strategic Planning with examples from China, Ukraine, Philippines, Ethiopia, Sweden, and Australia.

10. Assignment 2 Writing & Presenting a Policy Report: March 23
Workshop on preparing and recommending a strategic planning process to update an Official Community Plan. Round table discussion of Second Assignment and course questions.

11. April 6: Make up class if necessary

Special Needs
Please inform the course instructor as soon as possible if you have special needs and require accommodation of any kind. Please visit http://www.students.ubc.ca/access/ for more information on campus resources.

Supplemental Materials
UBC has numerous research, pedagogical and health resources available to students. These include The Centre for Teaching, Learning and Technology (CTLT), the Irving K. Barber Learning Centre, the Writing Centre, Student Health Services and Student Counselling Services. Please make use of these resources or contact the instructor if you have any questions. Students new to UBC are especially encouraged to become familiar with the broad spectrum of resources that UBC provides.

Academic Integrity
The University is an environment that fosters learning and the free exchange of ideas while maintaining responsibility and integrity. Violations of academic integrity include but are not limited to plagiarism, cheating, dishonesty, fabrication of information, submitting previously completed work and misusing or destroying school property. Any material or ideas obtained from digital or hard copy sources must be appropriately and fully referenced. Students are
expected to uphold all the standards articulated in UBC's academic integrity site. If the instructor finds evidence of a violation of academic integrity the case will be investigated by the Faculty of Graduate Studies and, where appropriate, action will be taken. Disciplinary action may lead to a failing grade or suspension from the University.