

School of Community and Regional Planning (SCARP)
University of British Columbia
COURSE OUTLINE

Course Number	PLAN 532
Course Credit(s)	3.0
Course Title	Strategic Planning: Developing and Implementing Policy Plans 2019
Term	2018-2019 Winter Term 2
Dates/Day/Time	Fridays from 9:00 am – 12:00 noon WMAX 150

Instructor	Ann McAfee
Office	WMAX 139 (Adjunct Office)
Telephone	604-936-7108
Email	amcafee@shaw.ca
Office Hours	By appointment

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 This course is designed to assist students to:

- Identify methodologies for analysis, preparation, and implementation of strategic/policy plans in Canadian and international contexts;
- Select appropriate tools for plan making including the use of 'original' and 'borrowed' research and 'onsite' and 'online' stakeholder engagement;
- Consider the roles of politicians, planners, various levels of government, private sector, NGOs, and citizens in planning sustainable futures;
- Write and present policy reports to elected officials; and
- Meet the Canadian Institute of Planners Competency Standards for Plan and Policy Making including developing visions and outcomes, information gathering and analysis, and obtaining input and approvals.

Course Requirements and Grading:

- 40% Assignment 1: Written Report and Class Presentation
- 40% Assignment 2: Written Report, Report Review, and Group Discussion
- 20% Participation in class discussions

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 and your critical assessment of various plan-making approaches to address current and future issues.

Course Materials: Computer/USB Flash:

There is no prescribed text. Web accessible readings will be identified weekly.
All Class presentations will be available. **Bring your computer or a USB to download materials.**

References: Assignment 2

BC Local Government Act Part 13 & 14 Division 4 Official Community Plans

http://www.bclaws.ca/civix/document/id/lc/statreg/r15001_13#part13

http://www.bclaws.ca/civix/document/id/lc/statreg/r15001_14#division_d0e43604

Metro Vancouver Regional Growth Strategy

<http://www.metrovancouver.org/services/regional-planning/PlanningPublications/RGSAdoptedbyGVRDBoard.pdf>

Strategic Planning PLAN 532

Classes 2019

- 1. Introduction to Strategic Planning: Friday January 4**
What is "Strategic Planning?" The context and challenge of combining land use, transportation, social, environmental, and economic directions into Sustainable Strategic Plans. Example Regional Growth Strategies, Official Community Plans, and Municipal Business Plans. Course overview and assignments.
- 2. Approaches to Strategic Planning: Friday January 11**
Strategic Planning process from Visions to Monitoring. Comparison of Traditional Strategic Planning Methodologies (SWOT) and Chancing Methodologies. Discussion of sustainability as an organizing framework.
- 3. Case Study: CityPlan Engaging Stakeholders in Policy Planning: Friday January 18**
Planning to plan--agreeing roles and responsibilities, stakeholder engagement techniques, maintaining momentum. Integrating social media tools into plan making.
- 4. Moving from Plans to Action: Friday January 25**
Developing 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. Case studies: Housing, Industry, and Financing Growth.
- 5. Assignment 1 Comparative Strategic Planning: Friday February 1**
Students lead discussions sharing information from Plan reviews.
- 6. Complete Assignment 1 Comparative Strategic Planning Plus Applying Canadian Processes to International Applications: Friday February 8**
International Strategic Planning with examples from China, Ukraine, Philippines, Ethiopia, Sweden.
- 7. Writing Policy Reports: Friday February 15**
The challenges of assembling strategic directions, conveying options, and framing recommendations for a Council or Board (Assignment 2). 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".

February 22: Mid-Term Break: No Class

March 1: Student Symposium: No Class

8. **Developing Regional Plans -- Field Trip to Metro Vancouver: Friday March 8 TO BE CONFIRMED.** Experience the planner-public-politician interface in the context of coordinating "multi-jurisdiction" plans. Metrotower 111, 4730 Kingsway, Burnaby. Board meeting starts at 9 am. Directions to follow.
9. **Moving between Regional and City Plans: Friday March 15**
Example case studies Region & City: Metro Vancouver, New Zealand, and Australia.
10. **Managing the Plan Making Process: Friday March 22**
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.
11. **Assignment 2: Writing, Reviewing, & Presenting a Policy Report: Friday March 29**
Workshop on preparing and recommending a strategic planning process to update an Official Community Plan. Review and round table discussion of Second Assignment & course questions.

STRATEGIC PLANNING 2019 ASSIGNMENT 1

Presentations: February 1 and 8
Assignments Due by: February 15

TASK

1. **Select an issue/topic typically covered in a city or regional strategic plan**, for example: Land Use/Growth Management, Transportation, Environment, Parks & Recreation, Infrastructure, Waste & Water Management, Economy, Housing, Culture, Social Equity, Community Character, Community Services, Community Health, Food, Finances.

If you are interested in researching a topic which is not typically covered in city-regional plans speak to Ann about your idea. There are emerging issues which need to be included in strategic plans. It would be great to consider new topics -- however it will take more thinking on your part with less opportunity to review existing plans.

2. **Research two Strategic Plans/Official Community Plans (from locations outside the Lower Mainland)** to compare similar/different approaches to addressing your issue/topic.
 - Identify good (and if it illustrates your point -- poor) examples of strategic directions, implementation actions, and monitoring.
 - How do plans handle the interrelationships between your topic and other Plan Directions?
 - What research/analysis underlies the policy direction?
 - What follow-up work has been done to further clarify or implement the plan?
 - Are evaluation criteria included? If not what would you suggest?
 - Include web addresses for Plans.

Likely your research will use the internet to access plans. If you have questions try contacting staff at the cities to clarify how the directions were established and are being implemented.

3. **Identify an interesting approach** taken by one (or both) plans which you think your colleagues would benefit from hearing about. **Prepare a 8 - 10 minute** presentation with a brief overview of your chosen plans followed by a presentation on your 'interesting approach' findings. Your class presentation will be shared electronically with other students for future reference.
4. **Prepare a brief report (5 pages)** which illustrates what you think are good (or poor) examples of how the two reports/plans address your topic. Example topics to cover are listed under point 2. Provide a paper or electronic copy to amcafee@shaw.ca of your report to Ann by February 15.

STRATEGIC PLANNING 2019 ASSIGNMENT 2

Roundtable Review, Discussion: March 29
Report Due: April 5 (e-mail to amcafee@shaw.ca)

Context:

Planners seldom can “wipe the slate clean” and develop an entirely new Plan. Usually the task is to update an existing Comprehensive Plan/ Official Community Plan (OCP) or add a new policy direction for a municipality.

Assignment

Your task is to select a Metro Vancouver municipality (from the following list: New Westminister, Burnaby, North Vancouver City, Surrey, Delta, Richmond, Port Moody, Coquitlam, or Port Coquitlam) and prepare a report to your Municipal Council proposing a process to update or amplify either a section of your Municipal Official Community Plan or add a new policy direction. Your task is to **propose a process** to either:

- Add a new topic to an OCP; **OR**
- Update an existing section of an OCP to incorporate new information (e.g. climate change adaption, resiliency); **OR**
- Move from a general OCP statement of intent (such as ‘put transit, walking, biking, and goods movement ahead of cars to slow traffic growth and improve the environment.’) to a proposal to prepare an implementation plan (for example a Transportation Plan) to operationalize the OCP direction; **OR**
- Propose a new policy initiative which, while it may not be incorporated into an OCP, will nevertheless provide Council direction to future initiatives. Typically, sections of an OCP focus on policies which are implemented through land use (e.g. zoning and development by-laws) and/or infrastructure investments (e.g. transportation). This option reflects moves by councils to adopt social and cultural policy directions which, given limited funding, are often implemented through external grants or negotiated through agreements with stakeholders.

The Report should be:

- Written for the City Council of either: New Westminister, Burnaby, North Vancouver City, Surrey, Delta, Richmond, Port Moody, Coquitlam, or Port Coquitlam
- Written in a “Council Report Format” providing:
 1. Recommendation(s)
 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.
 - Provide options for the updating process
 - Your Recommendation(s) to Council and justification/rationale for your recommended process.
 5. Conclusion/ Next Steps
- Report should be brief (maximum of 10 pages)

Report Review & Discussion on March 29.

- Bring 1 paper copy of your report for colleagues to review.
- Be prepared to review a colleague’s draft report and provide advice (and exchange your report for review).
- Be prepared to discuss your proposed process, recommendations, and learnings from the assignment. Format will be a round table discussion of key points (not an individual presentation).
- Bring course/ strategic planning questions for discussion.