



# PLANNING SCOPE OF PRACTICE



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## 1 EXECUTIVE SUMMARY

In 2014, the Professional Standards Committee (PSC) initiated a process to prepare a new definition of planning and identify a scope of practice for the profession. This work was undertaken in recognition that the current definition contained in the Membership Policy Manual had not been changed for over 25 years. In addition, there was also a clear need to understand and articulate a scope of planning practice to aid efforts by Provincial and Territorial Institutes and Associations (PTIAs) seeking right to practice legislation. Early in 2015, the Portage Group was contracted by the PSC to conduct this work. Over the following months, the consultants working closely with the PSC, conducted broad research and consulted widely with stakeholders including students, planners in all career stages, other professions and other planning organizations to understand and express what planners do. This research was also designed to uncover the key features that set planning and planners apart from other related professions.

This document describes the Scope of Planning Practice that resulted from this extensive consultation and research and that was subsequently supported by all 7 signatory parties to the PSC Agreement. Through the stakeholder consultations, many elements were identified as being key to the scope of professional planning practice. It is important to note that, given the breadth of areas and issues touched by contemporary planning practice, planning work is by nature broad and inclusive. This is reflected in the scope which is intentionally broad and inclusive to recognize the diversity in planning practice, yet identifies activities that are primarily undertaken by planners, rather than practitioners in other professions.

The document is organized in four main areas to describe the range in types of planning practice and activities, competencies that are required to effectively practice, and the planner's responsibility to the public and the profession:

- Types of Planning Practice
- Planning Activities
- Competencies
- Professional Conduct and Responsibility

The Scope of Planning Practice presents an overview of the breadth of contemporary planning practice, and is far from exhaustive. It is expected to evolve as planning itself changes over time. For these reasons, it is important that the scope of practice be revisited in the future to ensure it continues to be relevant to those it serves.

Overtime, this Scope of Practice will be integrated into the Membership Policy Manual. As work to finalize the Membership Policy Manual is on-going, the PSC is releasing the Scope of Practice as a stand-alone document so it can be used by the PTIAs as they pursue new legislation or amendments to existing legislation.

## 2 TYPES OF PLANNING PRACTICE

Planning is an extremely diverse profession. Planners can be found in the private, public and not-for-profit sectors. Their work ranges from local to international in scope and may contribute to projects that are short, medium or long-range in their planning time horizon.

Planning includes, but is not limited to, a variety of areas and specializations. Some of these areas include:

- Community and Regional planning
- Land use planning
- First Nations planning
- Social planning
- Health planning
- Environmental planning
- Transportation planning
- Heritage planning
- Urban design
- Recreation and parks planning
- ...and many more

## 3 PLANNING ACTIVITIES

### **Primary Planning Activities**

Planners are the “hub of the wheel.” They work together in inter-disciplinary teams with colleagues across many disciplines, including architects, engineers, designers, lawyers and real estate professionals, among many others. Planners coordinate many moving parts and blend this into a “comprehensive view” of the needs of a population.

Because planning intersects with a number of different professions, there are few activities that are truly ‘unique’ to planning. There are activities, however, that are primarily planning activities:

#### *Policy Development*

Policy development is a key product of planning practice, as is the development of regulatory controls and interpretation. Planners may be involved in the analysis, formulation, implementation and interpretation of planning policy.

#### *Stakeholder Consultation*

Stakeholder consultation is a core aspect of planning and typically includes some of the following activities:

- Communicating to the public and other stakeholders the intent of the planning exercise;
- Providing information to the public and other stakeholders;
- Investigating and identifying the goals and objectives of all stakeholder parties;

- Ensuring that all parties affected by the outcomes have the opportunity to participate in decision-making processes; and,
- Communicating policy, regulation and recommendations to stakeholders.

#### *Research and Analysis*

While not 'exclusive' to the profession, research and analysis is a core activity that falls primarily to planners and may involve some of the following planning-related activities:

- Collecting, assessing and synthesizing information;
- Integrating information from specialists, the public and other stakeholders;
- Synthesis of ideas on the development and use of land, resources, facilities and services from a social, physical, environmental and economic perspective; and,
- Analyzing information relative to the context of a planning exercise.

#### *Development and Evaluation of Options*

Developing and evaluating different options is a core activity that, while not exclusive to the profession, is an activity that falls primarily to planners. This entails using critical judgement and assessment tools to evaluate and present options that will inform a course of action.

#### *Providing Professional Recommendations and Monitoring Outcomes*

While providing recommendations is not exclusive to the profession, it is a core activity for many planners. Planners use their expertise to make recommendations for the future use of a space or place with the goal of promoting the public interest. They use their expertise to formulate policy, regulate development, implement strategies, and monitor outcomes.

### **General Planning Activities**

There are a number of additional activities that are important components of the work of planners while not being exclusive to the planning profession. These are summarized, below:

#### *Project Management*

Planners bring together ideas and best practices from multiple stakeholders and disciplines and develop these into workable plans that guide the development of livable, viable and sustainable communities.

#### *Mediation and Conflict Resolution*

Navigating the social and political landscape, negotiating and mediating decision-making, consensus building and conflict resolution are general activities for many planners.

#### *Communicating Planning Activities*

Communicating planning activities using multiple channels such as personal outreach, presentations, reports, social media and others is a general activity for many planners.

## **4 COMPETENCIES**

Planners must be adept at applying knowledge and skills across multiple areas in order to practice effectively. While these competencies are as diverse as the work planners do, and the roles they fill, the

Competency Standards for the Planning Profession in Canada summarize the key functional and enabling competencies required to practice planning.<sup>1</sup>

- Functional Competencies
- Human Settlement
- History and Principles of Community Planning
- Government, Law and Policy
- Plan and Policy Considerations
- Plan and Policy Making
- Plan and Policy Implementation Developments in Planning and Policy

**Enabling Competencies:**

- **Critical Thinking:** Includes skills and abilities such as issue identification; problem solving and decision-making; research and analysis; innovation and creativity; political awareness; and, change management.
- **Interpersonal:** Includes skills and abilities in integrity and trust; diversity and inclusiveness; facilitation; negotiation; collaboration and consensus building; and, conflict management.
- **Communication:** Includes listening; written, oral and visual presentation; information and knowledge; use of information technology; and, internal and external relations.
- **Leadership:** Includes Vision; responsiveness and influence; team building; maintaining a climate of excellence; and, managing resources and results.
- **Professional Conduct and Ethical Behaviour:** Includes professionalism; ethical standards; and, continuous professional learning. This competency is further explained below as it is a core focus in planning practice.

## **5 PROFESSIONAL CONDUCT AND RESPONSIBILITY**

Planners abide by a Code of Professional Conduct that outlines their responsibility to the public interest, and includes other stakeholders, such as clients and employers, the profession and other members.<sup>2</sup> Planners must uphold high ethical standards in all that they do.

Planners act first and foremost in the public interest. This means their work carefully weighs community interests within the context of long term social, environmental and economic sustainability. Planners must consider the impact of planning on additional factors, such as social equity, cultural diversity, justice, and public safety.

A commitment to continuous professional learning is required to ensure that planners practice with a thorough knowledge of current research, trends and techniques.

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<sup>1</sup> Summarized at a high level from the Competency Standards for the Planning Profession in Canada report submitted to the National Membership Standards Committee in July, 2010.

<sup>2</sup> Summarized from the Ethical Standards for the Planning Profession in Canada Report, submitted in 2010 by the National Membership Standards Committee.