GETTING EXCITED ABOUT PLANNING

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December 2016

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.[1] In First Nations, community planning is a process that helps communities become more self-sufficient and build capacity.[2] 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.[3]

***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. 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.

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[5]

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.[4] Since there has not been of history of formal, regulated planning 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	http://www.wfn.ca/docs/2007-01-land-use-law-schedule-a.pdf
Tsawout Comprehensive Community Plan	http://tsawout.com/files/Lands/CCP/Tsawout_CCP_1-52.pdf
?Aq'am Community Strategic Plan	http://www.aqam.net/sites/default/files/AQAM_Our_Thinking_v2.pdf

Endnotes

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SECURING FUNDING SOURCES

by Daniel Broderick
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April 2019

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[1]. 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[2]. Planning projects often require funding beyond what is provided by the Canadian government[3]. Projects include a community or land use plan, and the implementation and monitoring of planning projects.

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

Without adequate funding, your community may be forced 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.

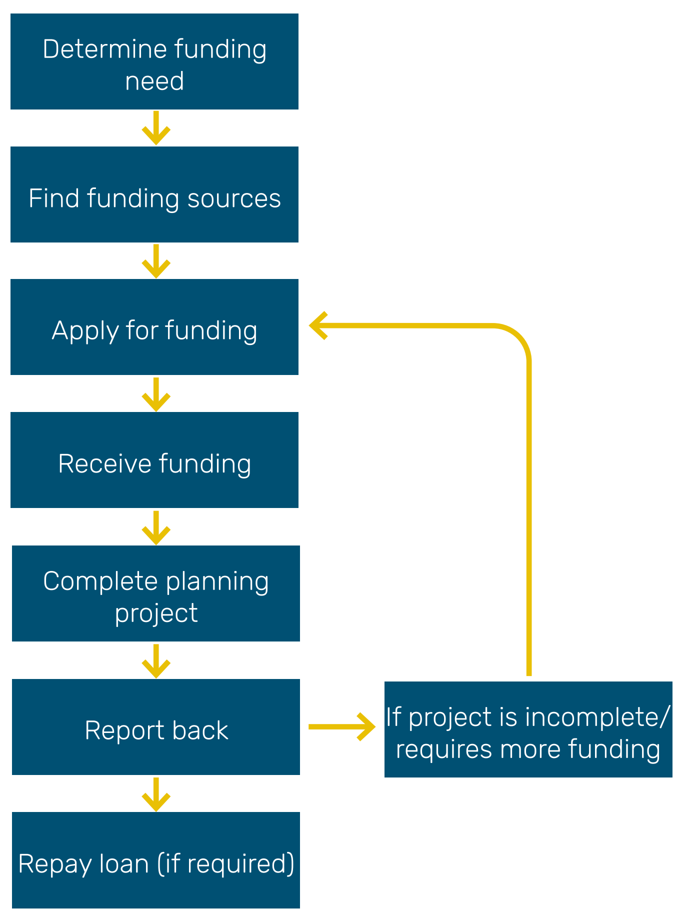

Figure 1 | The simplified funding process.

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[4]. 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[5]. 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/rsrcs/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[6]. The application requests that the programs seeking funding be listed with their objectives, planning activities associated, and a proposed budget[7].

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[8].

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[9,10].

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[11]. 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[12].

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[13]. 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

by Adam Fiss
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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[1]

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.[2]

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.[3]

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."[14]
>
> – 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."[4]

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 built a planning team."[5] The champion brings people together, making them feel comfortable and included. They are passionate about working with and learning from members in your community.[6] 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."[7]

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.[8] 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.[9]

When Does the Planning Team Operate?

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

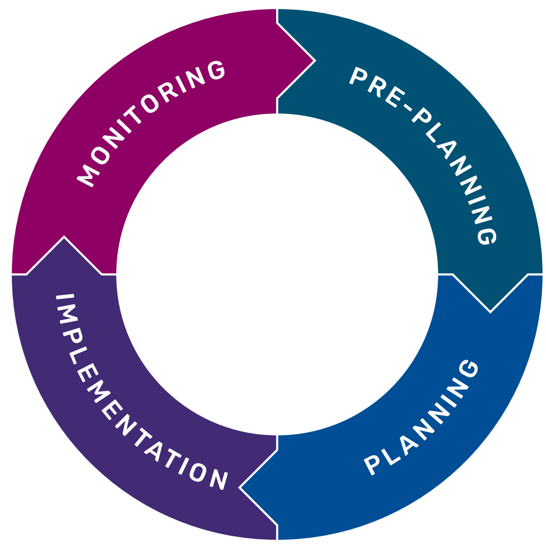
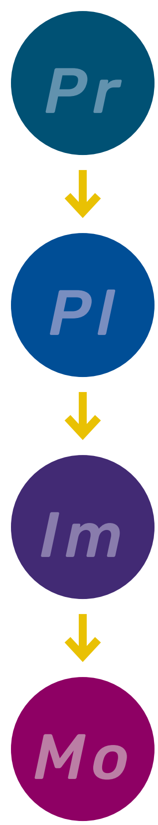


***Figure 1** | The planning cycle.*
Adapted from (Indigenous and Northern Affairs Canada / Indigenous Services Canada. "CCP Handbook: Comprehensive Community Planning for First Nations in British Columbia, Third Edition." 2013. Accessed October 24, 2016, http://www.aadnc-aandc.gc.ca/DAM/DAM-INTER-BC/STAGING/texte-text/ccphb2013_1378922610124_eng.pdf. p. 14.) *Used with permission.*



The team is formed during the pre-planning phase. Share team members' names with the community so people know who to talk to if they have any questions.

The team organizes community events during the planning phase. By the end of the planning phase, "the planning team will have … goals, objectives, actions, projects, and desired outcomes in each planning area."[10]

The team will invest a lot of time in this phase to meet with community members and oversee projects. The team will update the community on project progress, often with advisory committees and focus groups.[11]

In the final stage, the planning team oversees project monitoring and evaluation. The team shares "lessons learned with the community and leadership."[12]

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.[13]

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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Faculty of Architecture
Department of City Planning

University of Manitoba

Indigenous Initiatives Grant

WORKING WITH A PROFESSIONAL PLANNER

by Mike Wakely
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April 2018

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.[1] 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.[2]

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.[3] 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.[4] 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.[5]

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.[14] 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.[15] 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.[16]

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.[6] 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:[7]

- 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.[18] Whenever possible, a professional planner should offer to train a community memmber 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.[19]

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.

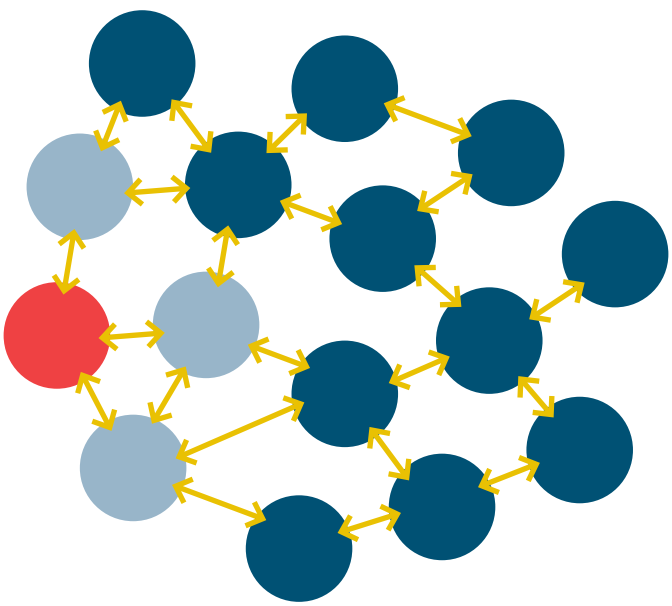

Figure 1 **|** *Building capacity from the planner to a community member and then to the wider community.*

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.[8]

Figure 2 **|** *Map making, one service a prodessional planner can offer*
Source (Spratt, Annie. "Vintage Map Photo." 2018. Unsplash. https://unsplash.com/photos/BkbbuOdX06A.)

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.[9] 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 competetive 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.[17]

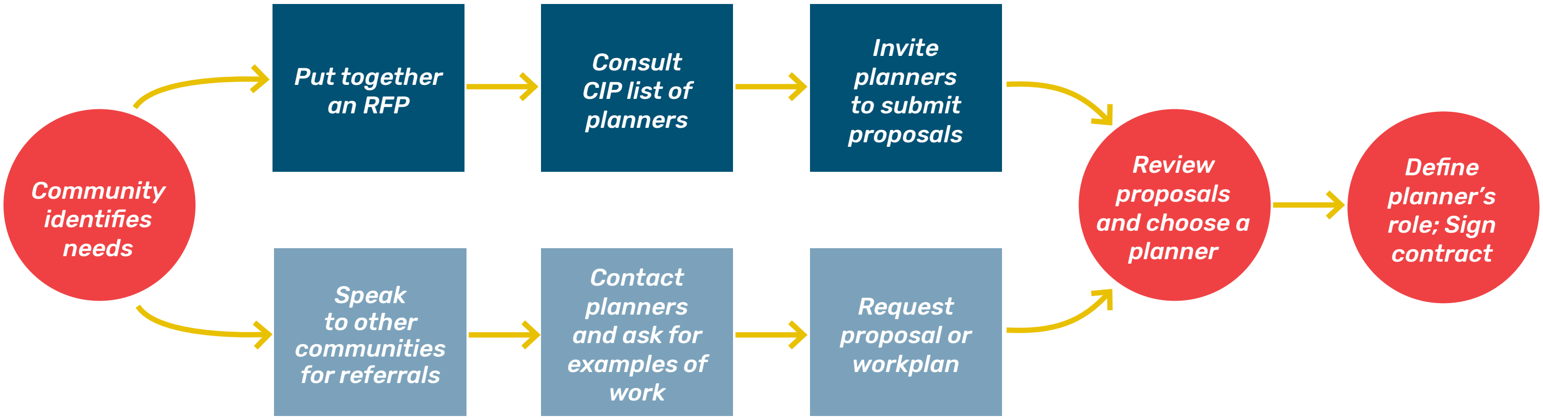

Figure 4 | *Choosing a planner can be done through RFP (top) or referral (bottom). The circles represent steps common to both appraoches.*

What are the Expectations?

Planners should:[10]

- 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[11]

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[12]

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.[13] 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 setailed guide of best practices for First Nations enagaging 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. Web-site: 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.
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12 CIP, 2010, p. 12.
13 First Nations Information Governance Centre, "First Nations Principles of OCAP," *First Nations Information Governance Centre*, n.d., Accessed November 20, 2017, http://fnigc.ca/ocap.html.
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.[1]

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.[2] 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

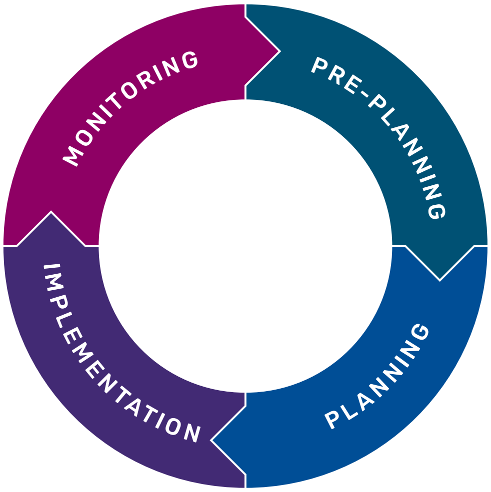


***Figure 1** | The planning cycle.*
Adapted from (Indigenous and Northern Affairs Canada / Indigenous Services Canada. "CCP Handbook: Comprehensive Community Planning for First Nations in British Columbia, Third Edition." 2013. Accessed October 24, 2016, http://www.aadnc-aandc.gc.ca/DAM/DAM-INTER-BC/STAGING/texte-text/ccphb2013_1378922610124_eng.pdf. 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.*

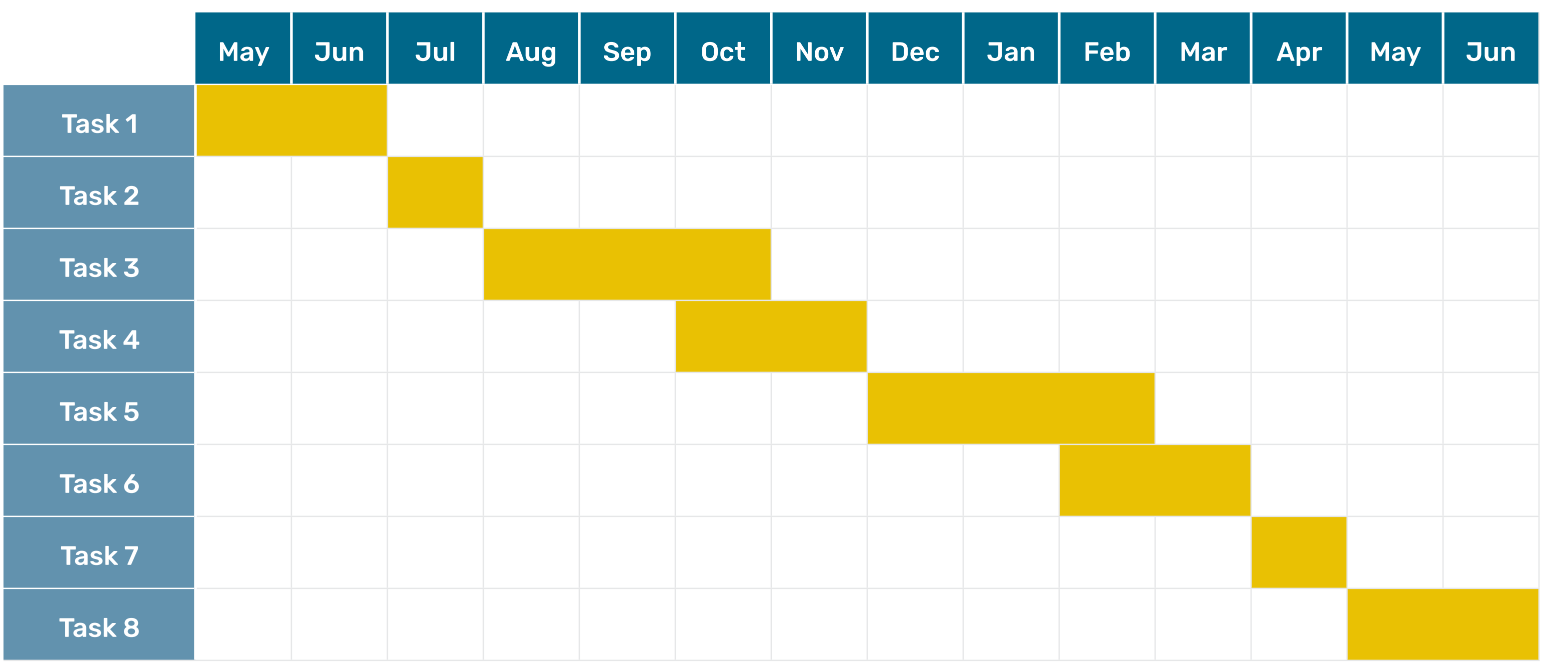
Timelines: When Will Tasks Get Done?

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.*



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

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. p. 22.

2 INAC, 2013, p. 46.

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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 engagment, 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.[1]

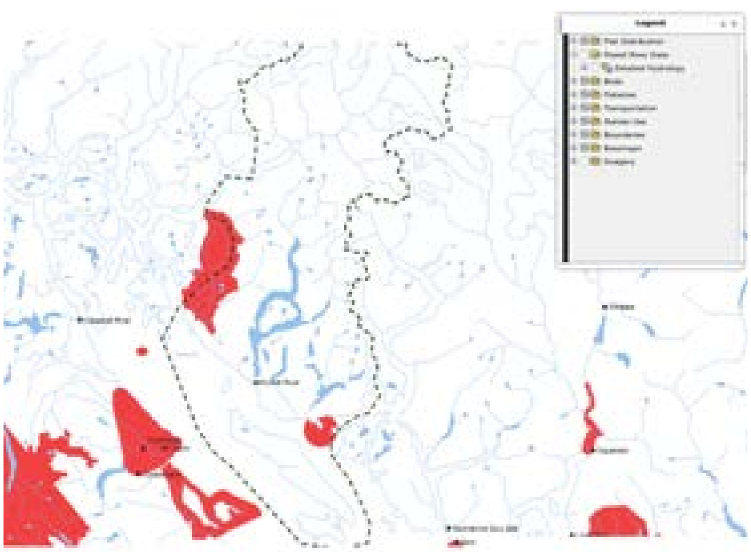

Figure 1 | *An interactive online map of fish and bird habitats in the Powell River Watershed.*
Source (Digital image. Community Mapping Network. 2015. http://cmnmaps.ca/POWELLRIVER/) *Used with permission.*

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.

> "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."[3]
>
> Doug Abereley

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.[2]

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	• decide the atlas' purpose and think about how it will be used • decide what information you will need	• involve experts in mapping and land use planning if needed • involve community members to ensure they help define the purpose of the atlas and provide locally relevant guidance

Creating Your Community Atlas	• collect the data and community input you need
	• organize the data you collected
	• What information is missing or incomplete?
	• How will you want to display this information on maps?
	• How will you analyze and display the data?
		• depending on the purpose and use of your community atlas you will need input from different people:
		  • land use planners
		  • mapping technicians
		  • local politicians
		  • community members

Using Your Community Atlas	• if your community made a map for a specific reason, you already know how it will be used.
	• other uses can include:
	  • a large community display
	  • existing reports or planning documents
		• your band office may want to include maps from your atlas in reports, plans, and documents
		• land use planners, consultants, and local government may include your atlas in their work
		• your atlas can be used with the broader community as an interactive learning, engagement, and communication tool.

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

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
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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.[1] 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.[2]

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.[3]

How Do You Build a Community Profile?

Themes of Information

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

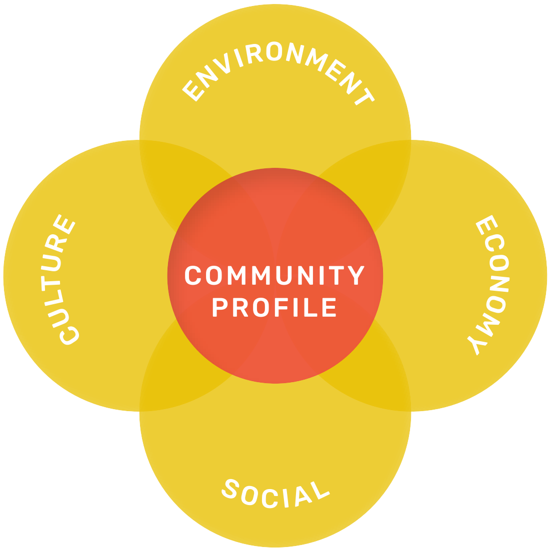

Figure 1 | Themes of information in a community profile.

The first theme is the environment.[4] 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.[5] 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.[6] 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.[7]

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.[8] 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.[9]

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.[10] 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

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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.[1] Topics can include the natural and built environment, society, culture, and economy.[2] 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.[3] 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:[4]

- **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[5]

What are the Steps to Use a Community Profile?[6]

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.[7]

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 mine. 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.

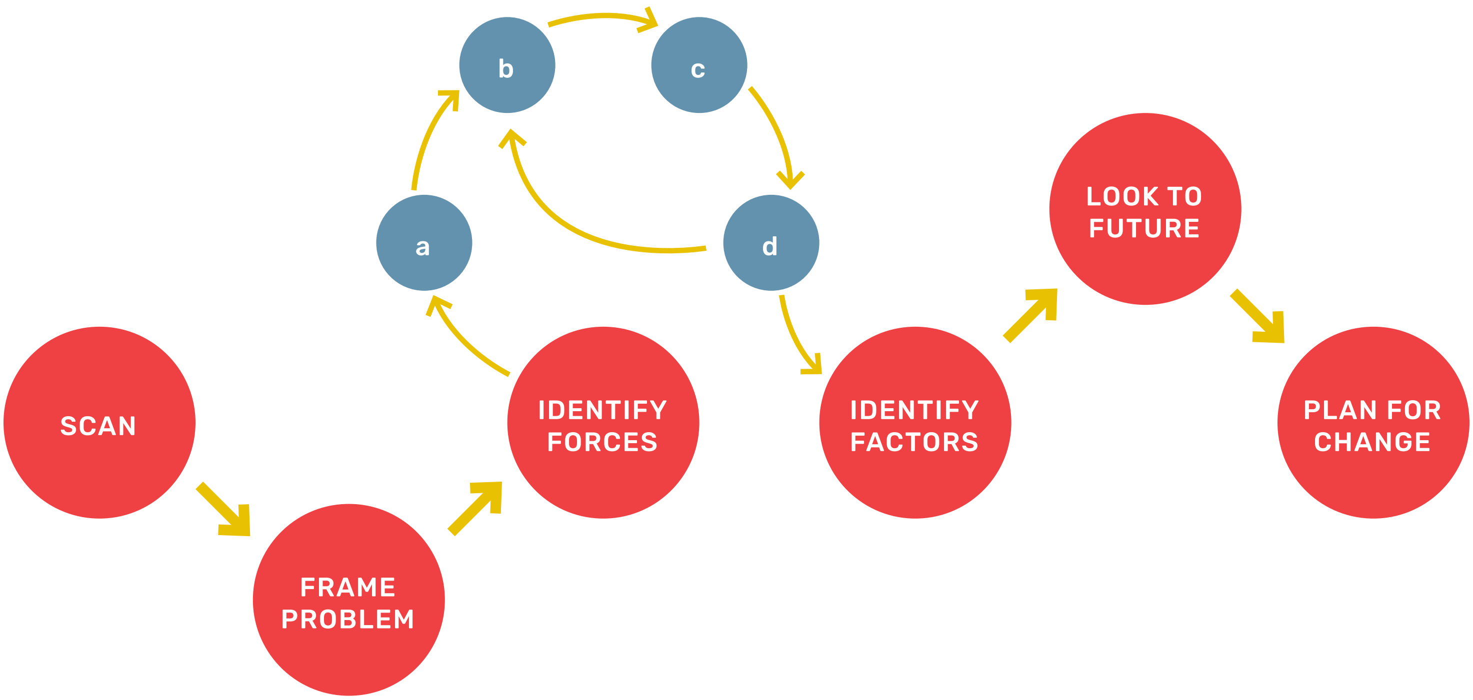

***Figure 2** | Steps to use a community profile.*

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.[8] 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.[9]

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

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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8 Indigenous Affiars and Northern Development Canada, 2006, p. 66.
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CONDUCTING ARCHIVAL RESEARCH

by Olivia Michalczuk
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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[1] 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.[2]

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.

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: [3]

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 makes 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.[4]

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:[5]

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 and 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/rsrcs/pblctns/mvng-twrd-strngr-ftr/index-en.aspx#a13

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5 City of Winnipeg, "Making the Best Use of Archives," *City of Winnipeg,* 2014, http://www.winnipeg.ca/clerks/archives/bestUse.stm.

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.[1]

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

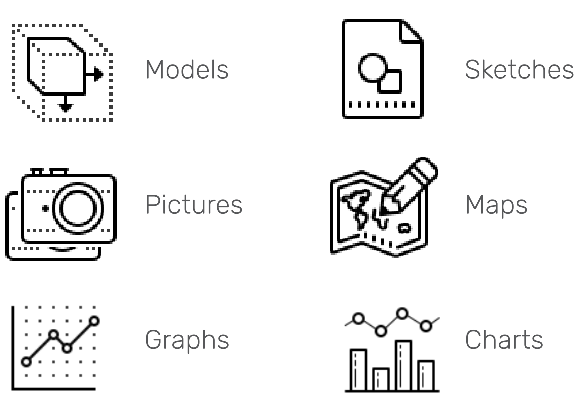

Figure 1 | Visual Aids
Adapted from (Icons8 LLC. 2020. Free Design Resources and Software. 2020. Accessed January 16, 2020 from https://icons8.com.)

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.[2]

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

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.

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.[3]

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.[4]

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.[5]

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.[7]

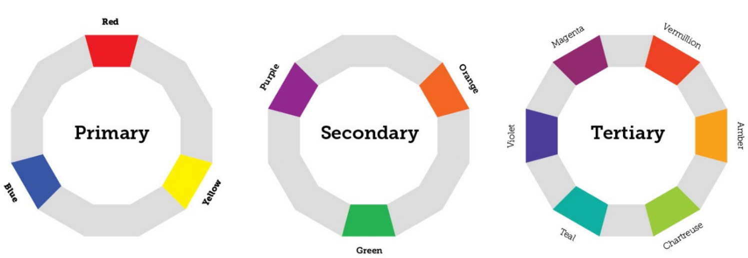

Figure 2* | *Primary, secondary and tertiary colours of the colour wheel.
Source (Nediger, Midori. "Colour Wheel". Digital Image. *Vennage.com*. How to Pick Colors to Captivate Readers and Communicate Effectively. February 1, 2018. Accessed November 15, 2019 from https://venngage.com/blog/how-to-pick-colors/)

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.[8]

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.[9]

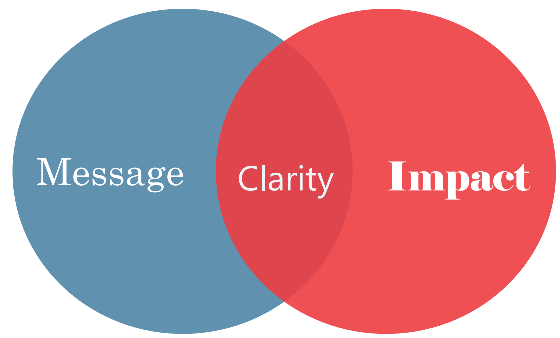

Figure 3* | *Striking the balance.

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?[10]

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.[11]

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.[12]

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.[13]

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.[14]

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?[15]

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.[16]

***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 langauge. 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

by Kahla Pretty
Indigenous Planning Studio
January 2020

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.[1]

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.[2]

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)

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/rsrcs/pblctns/mvng-twrd-strngr-ftr/mvng-twrd-strngr-ftr-en.pdf

Endnotes

1 Indigenous Governance Toolkit. Accessed November 15, 2019. https://toolkit.aigi.com.au/.

2 Indigenous & Northern Affairs Canada, "CCP Handbook: Comprehensive Community Planning for First Nations in British Columbia, Third Edition," *Indigenous & Northern Affairs Canada,* 2016, Accessed November 17, 2019, https://www.aadnc-aandc.gc.ca/DAM/DAM-INTER-BC/STAGING/texte-text/ccphb2013_1378922610124_eng.pdf.

CREATING A COMMUNICATION PLAN

by Isaac Laapah
Indigenous Planning Studio
January 2020

Summary

This fact sheet discusses what a communication plan is and its components. There is also information on how to structure a communication and engagement plan, and how to measure the success of the plan.

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

Why Is Communication and Engagement Important?

It is important that a community discusses how to involve people in decision making and implementation. Engagement and communication are crucial for all stages of the planning process.[1] Engagement and communication help to determine how the community brings its members together to share ideas on moving the community forward.

> *Communication and engagement allow members to be actively involved at every stage of the community's development agenda.*

When results are achieved or problems arise, engagement and communication is needed to enable the planning team to tell the community what is happening. Similarly, communication and engagement allow members to be actively involved at every stage of the community's development agenda.

The engagement and communication plan can have sections like: Goals and objectives; Principles; Level of engagement; Audience identification; Methods and materials; Monitoring and feedback.

What Is a Communication Plan?

A communication plan is a tool that describes how information about programmes will be communicated to community members.[2]

Why Develop Goals and Objectives?

Developing goals and objectives enables your community to establish long term aims of what you would like your communication and engagement activities to look like and gives your community a sense of direction on how to reach those aims. The goals and objectives help the community understand the purpose of the engagement and communication plan and ensures that the community "has a shared understanding of engagement objectives and principles, key messages, challenges and opportunities, activities and tools, and evaluation".[3]

For more information on goals and objectives, see the *Setting Goals and Objectives* fact sheet.

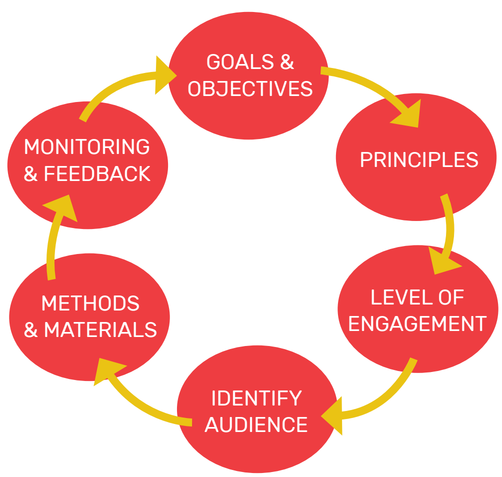

***Figure 1** | Steps in creating a communication and engagement plan.*

How Do You Establish Principles?

The principles guide how a community can incorporate its values into communication and engagement planning.[4] The principles also serve as a guide to tap into the experiences of members living both on- and off-reserve for community plan preparation and implementation. There is no complete list of principles to include in the engagement and communication plan. You choose the principles to include based on the values your community wants to attach to its engagement and communication activities.

Table 1* | *Sample community engagement and communication principles.
Adapted from (Perth and Smiths Falls District Hospital. "Communications Strategy & Community Engagement Framework." *Perth and Smiths Falls District Hospital*, February 28, 2017. Accessed November 11, 2019, https://psfdh.on.ca/wp-content/uploads/2013/10/PSFDH-Comm-Engage-Plan-2017-Approved-Feb-28-17.pdf. p.4)

Effective • Engage early enough to make a diference • Resource it properly • Monitor and evaluate its effectiveness	***Timely*** • Inform participants about how long an engagement is expected to last and when feedback will occur
Inclusive • Ensure that a cross section of the community is invited to the engagement activity	***Appropriate*** • Utilize levels and methods of engagement and communication that are appropriate to the purpose of the engagement
Transparent • Engage with stakeholders in an open process, with transparent purpose, goals, expectations and constraints • Be open about how the engagement will be used in decision-making	***Balanced and accountable*** • Balance the participation and influence of participant groups • Monitor the ongoing effectiveness of the community engagement and communication strategy
Community benefit • Provide clear, accessible and comprehensive information to participants to facilitate involvement	***Respectful*** • Use tools appropriate to participants, hear and listen to what people say • Create realistic timelines

What Is Your Current Level of Community Engagement?

Community engagement and communication has the potential to move community members from passive participants to empowered leaders.[5] That is, they can change from being observers and consumers of decisions to making decisions on issues that affect their livelihoods.

There are five levels of engagement that measure the involvement of community members in decision-making.[6] Your community may assess their present position on the levels of engagement in Figure 2 and use the communication and engagement plan as a tool for ongoing improvement.

Figure 2* | *The levels of community engagement.
Adapted from (Darrell Phillips & Wanda Phillips-Beck, "Moving Towards a Stronger Future: An Aboriginal Resource Guide for Community Development", *Public Safety Canada*, 2015, Accessed November 12, 2019, https://www.publicsafety.gc.ca/cnt/rsrcs/pblctns/mvng-twrd-strngr-ftr/mvng-twrd-strngr-ftr-en.pdf p.45)

Levels of Community Engagement

1 Passive Engagement

At this level, community members are only informed of issues by Chief and Council and band staff but have minimal contributions to the issues at hand.

2 Reactive Engagement

Community members provide input into the issues, but band administration and Chief and Council still lead in handling issues and maintaining priorities and resource use.

3 Participative Engagement

Community members increase their influence on the priorities and resources of the community as well as available external resources.

4 Empowerment

Community members work in partnership with the band staff to share in the planning and implementation of mutually agreed-upon actions.

5 Leadership

At this level, community members take the front role in initiating, planning and implementing actions and only seek support from external sources on technical skills beyond their capacity.

Who Are Your Audiences?

Every community is made up of varied and overlapping groups such as youth, Elders, knowledge keepers, men, women and community organizations. Together, these groups make the community what it is. Each of the identified groups and organizations may have different influences, information and interests in the community's development.

Your community can also visualize its long-term decision-making ability and targets using the Asset-Based Community Development (ABCD) Geometry lesson[7] in Figure 3 which advocates for community members to lead the decision-making processes and only involve external professionals when in need of technical expertise.

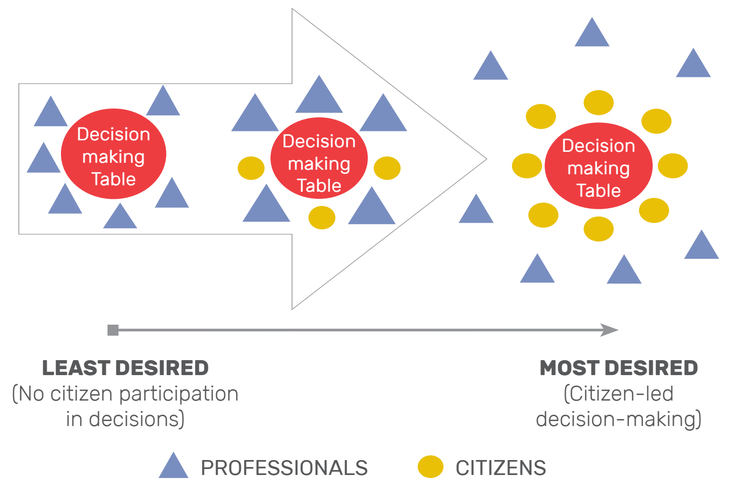

Figure 3* | *ABCD Geometry Lesson
Adapted from (Dan Duncan. "The Components of Effective Collective Impact." Digital image. *Clear Impact*, December 2016, Accessed November 12, 2019 https://clearimpact.com/wp-content/uploads/2016/10/The-Components-of-Effective-Collective-Impact.pdf p.4)

You may need different strategies to communicate with the different groups in your community. Unique groups in your community may have different perspectives and ways of seeing the world. By knowing what groups and organizations exist in your community, you can determine the appropriate tools to use in engaging and communicating with them.

What Are Some Ways to Communicate?

Outreach Materials

The type of material used in engagement and communication, and the key messages, must be clear to the audience. The key messages should also be consistent with the goals and objectives. The information should be timely and useful when they are communicated.[8] The communication approach and the way information is displayed should be appropriate and tailored to your audience. You may also explain the purpose of key messages whether it is to show results, lessons learnt, next steps, etc. The engagement and communication materials should have:

1. Attention grabbing content
2. Easy to understand visuals
3. Legible materials

Methods

How will the message get to the target audience? Different methods are appropriate for different events and different audiences. For some events, a combination of several methods may be appropriate. In other instances, the method to use may be tied to the venue for the engagement session. The type of method or combination of methods to use are community specific.9

Some communities have used methods including online discussion forums, community art, radio meetings and newsletters as ways of engaging and increasing communication among community members.[10]

For more information on designing communication methods, see the *Sharing Your Community Plan* and *Communicating Ideas Using Visual Aids* fact sheets.

Community Calendar

A community calendar helps you understand when to hold community engagement activities.[11] Certain seasons may not be appropriate to schedule engagement activities because of cultural or traditional activities, or conflicts with other community events. In developing the community calendar, all important community dates, events and seasonal activities can be highlighted on the calendar. It may also be important to develop a month-to-month calendar in order to effectively track community activities. Having a community calendar designed for internal use helps you know when people are available and when it is best to schedule community engagement meetings and activities.

Why Should You Monitor Progress and Evaluate Success?

The engagement and communication plan requires regular check-ins, evaluation and review to determine if the goals and objectives are being met. This should be done periodically during the implementation of the plan. How often these measurement and checks occur is dependent on the preferences of the community. You can use performance indicators such as;

- How many engagement activities have been completed?
- What was the attendance like at the activities?
- What was the average time of the activities?
- How involved were the participants?

This way, you can assess the effectiveness of the methods, period of engagement, participant involvement, and other parameters you have included in your engagement and communication plan. There should be a feedback loop in the engagement and communication plan so that any lessons learnt from previous implementation can be used to improve the plan in the future.

For more information on assessing your communication plan's effectiveness, see the *Monitoring Your Progress* fact sheet.

Final Thoughts

Having an engagement and communication plan is a good way for a community to control how it strengthens participation in decision-making and project implementation.

A plan allows your community to explore the best ways of connecting with one another and with both local and external organizations in the community's development.

Further Reading

Creating the Culture for Community Engagement by Lisa Attygalle Author

This paper provides strategies for changing and improving communication and community engagement.

https://www.tamarackcommunity.ca/hubfs/Resources/Publications/Creating%20the%20Culture%20for%20Engagement.pdf?hsCtaTracking=72586817-38d8-4bc3-989d-0952912b95da%7C53d7d90b-ae83-4438-8aa3-a5575051c37b

Community Engagement Framework: A Guide to Effective Partnership Building by Mount Sinai Hospital.

This publication provides an outline to guide communities in developing their own communication and engagement plan.

https://www.mountsinai.on.ca/about_us/community-development-integration/Community-Engagement-Framework.pdf

Community Engagement and Communication by The Health Systems Intelligence Project, Ontario.

This document contains in-depth information about developing a communication and engagement plan. While the focus is on health service providers, the strategies discussed can be used in other contexts.

http://www.ontla.on.ca/library/repository/mon/15000/268203.pdf

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BUILDING FACILITATION SKILLS

by Emily Halldorson
Indigenous Planning Studio
April 2019

Summary

This fact sheet discusses what facilitation is, what the skills and responsibilities of a facilitator are, and simple tools to support facilitation. Facilitation skills are important because they support community involvement and inclusivity throughout the planning process.

Keywords: community engagement, communication tools, reporting back, collecting data, managing the process, direction setting

Figure 1 **|** *Community Engagement Session.*
Source (Bradd, Sam and Brown, Stina. "Climate Justice Conversations Using Graphic Recording." Digital image. International Forum of Visual Practitioners. no date. Accessed January 22, 2019, https://www.ifvp.org/users/sam-bradd) *Used with permission.*

What Is Facilitation?

Facilitation is the process of guiding community gatherings to encourage productivity and engagement. Facilitation is about making discussions inclusive, positive, targeted, and effective. Facilitation skills can be used at meetings, workshops, or open houses. Effective facilitation can be done with groups of three people, or several hundred, although the specific strategies or activities used may vary.

Who Should Facilitate?

Planning team members, Elders, community members, and community leaders can all be facilitators. A facilitator can be a single individual or two or more people can be co-facilitators.

What Makes a Good Facilitator?

Unlike a meeting chair, a facilitator guides discussion but does not lead.[1] A facilitator is interested in how people participate in the discussion, not simply what is accomplished. A facilitator is neutral and never shares their opinion.

Some of the skills of a good facilitator are:[2]

- Communication and Presentation Skills
- Active Listening and Good Questioning
- Time-Keeping
- Flexibility
- Objectivity
- Sensitivity to Group Dynamics
- Conflict Resolution

Figure 2 **|** *Strategic Planning Session.*
Source (photo by author. "Facilitator Kemlin Nembhard leads Strategic Planning Session". Digital image. January 27, 2019.) *Used with permission.*

What Are The Facilitator's Responsibilities?[3]

Plan Ahead - Facilitators don't 'wing it'. Give yourself lots of time to determine the goals and objectives of the meeting, find a suitable time and place to hold the event, and design activities, discussions, and questions that will elicit the information required. Time spent planning the process will be rewarded with community buy-in and better quality data.

Get the Word Out – Promotion is key to a well-attended event. Consider who the community members and stakeholders are, and what the best methods to reach them are. There are many common methods, such as social media, posters, band websites, word-of-mouth, and door-knocking. Unconventional methods, such as community vision contests for youth, visiting mobility-impaired individuals directly, or hosting gatherings in conjunction with other community activities, can lead to a better turn-out.

Prepare the Meeting Space – Hold the gathering at a time and place that will enable the majority of community members to attend. Pick a location where participants will feel comfortable visiting. Offer childcare in an adjoining room or involve children in the process. Make the space as inviting as possible, by offering places to sit, and refreshments. Arrive at the space well-ahead of time to allow lots of time to set up before participants arrive. If you are using audio-visual equipment, check it ahead of time to make sure it's working.

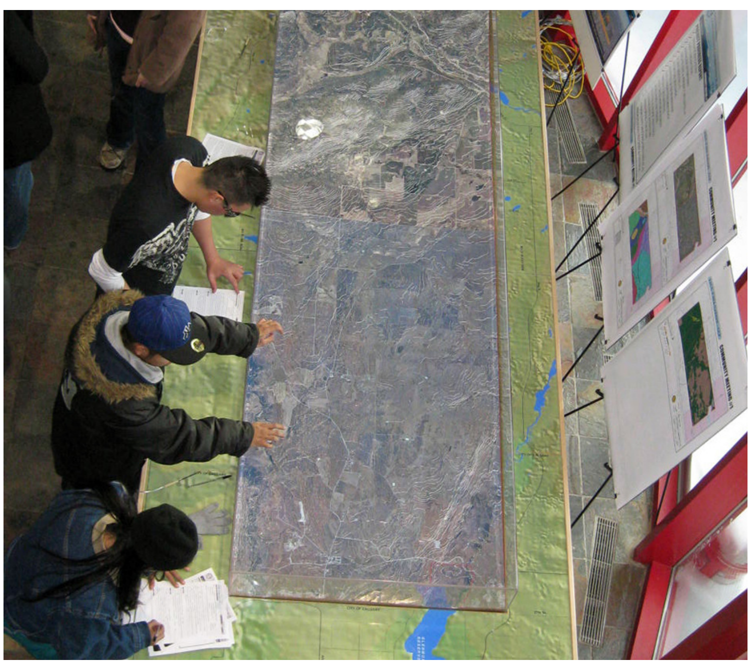

Figure 3* | *Tsuu T'ina Nation CCP Engagement Session.
Source (Dillon Consulting. "Comprehensive Community Plan - Alberta." Digital image. Dillon Consulting. no date. Accessed January 22, 2019, http://www.dillon.ca/projects/project-details/comprehensive-community-plan---alberta)

Welcome Participants – Start the event by welcoming all participants, and introducing members of the planning team, Elders, Chief and Council, and/or guests. Depending upon the size of the group, around-the-table introductions or an icebreaker activity can be used. A smudge or prayer can also be shared. Make sure to track event participation by having a sign-in sheet. Space can also be provided on the sign-in sheet, for participants to provide contact information so they can be invited to the next event.

Outline the Agenda – A clear agenda can help keep the event on track. Outline the agenda to participants at the beginning of the meeting so that they know what to expect. Make sure to allow time for breaks, especially during a longer event. Let people know where amenities are located, such as washrooms, snacks, or water.

Set Ground Rules – Outline the rules of participation before you start so that participants know what is expected of them. Either use community protocol to establish these or have participants identify the rules themselves, while you record them on a flipchart. Post the sheet on the wall throughout the meeting.

Common rules include:

- Turn your phone off or on vibrate.
- One person speaks at a time.
- Do not interrupt others.
- Listen to others, and try to understand where people are coming from.
- Do not mock or attack other people's ideas.
- Be on time when returning from breaks.
- If you have to leave early, or leave the room, do so in a way that does not disrupt others.

Guide Discussion and Keep Participants on Track – This is the most challenging step in the facilitation process. Keep the agenda, goals and objectives close at hand, and refer to them when needed. Use discussion questions, break-out groups, and/or activities to help guide and focus discussion. Plan what you will do to engage quieter participants, and respectfully respond to dominant voices. Have a strategy to respond to conflict.

Summarize the Meeting and Thank Participants – Bring closure to each discussion. At the end of the meeting, summarize the conversation or results, and allow time for any concluding thoughts. Thank all of the participants and hosts for their time, their valuable opinions, and for making the gathering a success.

For ideas, see the *Celebrating Success* fact sheet.

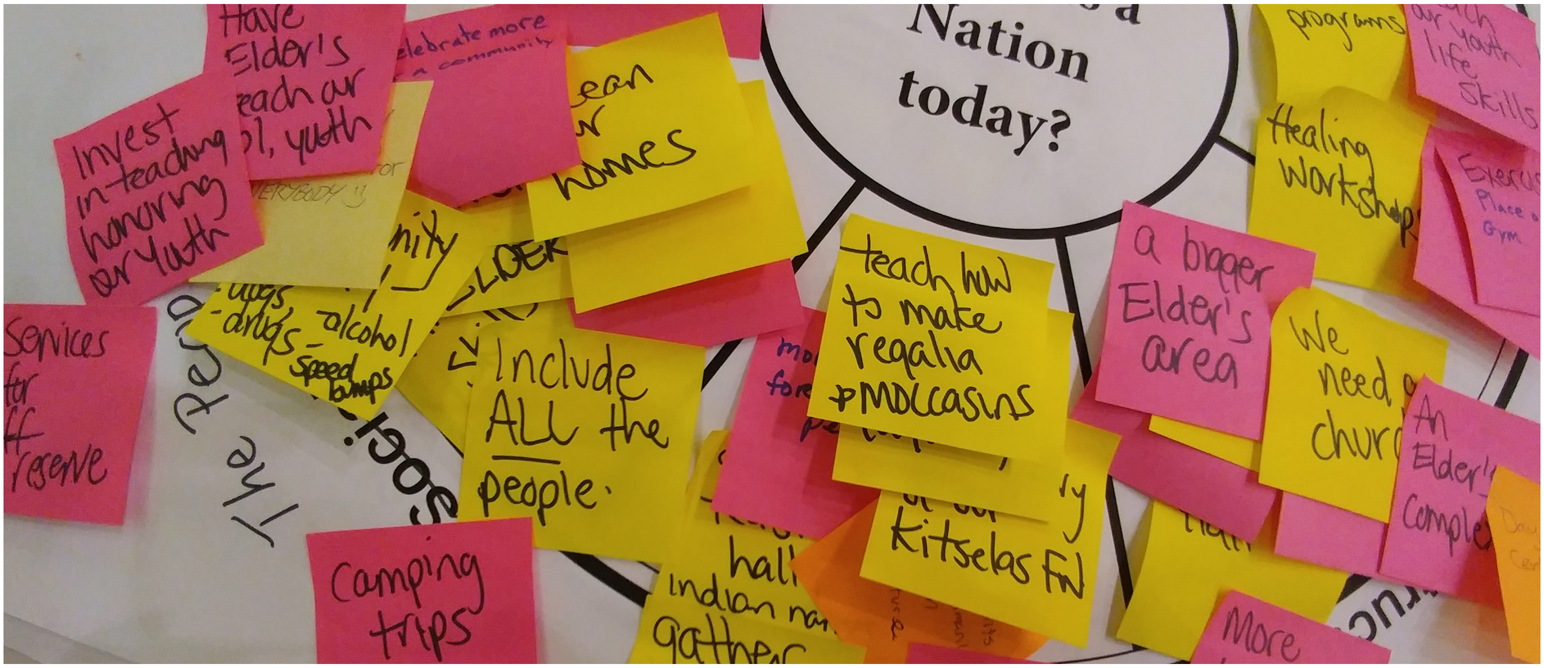

***Figure 4** | Kitselas First Nation CCP Engagement Session.*
Source (Meraki Community Planning. "Kitselas First Nation CCP Communications and Engagement Strategy." Digital image. Meraki Community Planning. no date. Accessed January 22, 2019, https://merakiplanning.ca/kitselas-first-nation-comprehensive-community-plan/) *Used with permission.*

Simple Facilitation Tools

Post-it Notes, Flip-Chart Paper, Coloured Markers

Having the right supplies can help an event run smoothly. Post-it notes can be used by participants to identify concerns or ideas in a community mapping exercise, or to identify priorities on a timeline. Flip-Chart paper can be used by the facilitator to document a large group discussion, or by participants to record break-out group discussions. Markers are a fun way to categorize ideas, or encourage participants to sketch things out. Remember to save all the notes created by participants for the data analysis phase.

For information on data analysis, see the *Analyzing Surveys* fact sheet.

Pictures, Maps, Drawings, Lego

Visual aids can help stimulate discussion. Visual aids can include maps of the community, pictures of planning events and actions completed so far, drawings of community member's visions for their community, or Lego for participants to demonstrate ideas. These kinds of tools can help participants visualize what's possible. Many fruitful group activities can be built around the use of visual aids.

For information on using visual aids, see the *Mapping Community Assets, Developing the Vision Statement*, and *Communicating Ideas Using Visual Aids* fact sheets.

Break-out Groups

With a large group, or a group with dominant voices, breaking up into small groups can be a great way to make sure all participants get an opportunity to speak. Split a large group by numbering individuals or providing them with coloured stickers. Participants with the same number or colour form a group, and are provided a question or topic for discussion. Remember to bring the groups together again after to share what they have discussed.

Discussion Questions

Having some extra discussion questions on hand is a good way to ensure momentum in the conversation. When there is a lull in discussion, you will be able to effectively switch gears by asking a question on a new topic, or learn more by asking a related question.

Anonymous Feedback Forms

Despite your best efforts, there will always be individuals who have burning thoughts, but don't feel comfortable sharing them in the meeting. Having an opportunity for community members to write down any remaining questions or concerns, and submit them to the planning team anonymously, can help make sure that all voices are heard, even when the discussion includes sensitive topics.

Figure 5 | *Indigenous & Northern Affairs Canada CCP Workshop (Yukon)*
Source (INAC. "Yukon CCP and Proposal-Writing Workshop." Digital image. Flickr. February 8, 2017. Accessed January 22, 2019, https://www.flickr.com/photos/aandcanada/33821255522)

Final Thoughts

Effective facilitation supports data collection and community engagement. It can help community members see the value of participating in the planning process, and increase participation. Since a facilitated meeting is planned, guided and well-organized, the information gathered reflects these qualities. This makes data analysis easier as well, and information can be more easily translated into goals and objectives.

Facilitation skills can also be used in community meetings during the implementation and evaluation phases of the planning process.

Further Reading

Community Toolbox by the Centre for Community Health and Development

Chapter 16: Group Facilitation and Problem-Solving provides an overview of meeting and facilitation skills, tips for recording meetings, and techniques for leading group discussions.

https://ctb.ku.edu/en/table-of-contents/leadership/group-facilitation

Facilitating Meetings: A Guide for Community Planning Groups by the Academy for Educational Development and Centre for Community-Based Health Strategies

This guide provides an overview of facilitation skills, guidelines for dealing with conflict, and check-lists to help guide you through the process. A list of useful additional resources is included.

http://preventiontrainingservices.com/resources/Facilitating%20Meetings%20version_2005.pdf

Facilitator's Guide to Effective Workshops by the Ontario Native Women's Association

This guide discusses facilitation skills, ice breaker and energizer activities, responding to group dynamics, and tools to evaluate workshops. Consideration is also given as to how Elders and cultural practices can be integrated in the facilitation process.

http://www.onwa.ca/upload/documents/facilitators-manual-vol-1.pdf

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3 Marya Axner, 2018.

ENGAGING YOUR COMMUNITY

by Jeff Hanson
Indigenous Planning Studio
December 2016

Summary

This fact sheet discusses what community participation is, what the common issues are, and how to improve participation.

Keywords: community engagement, collecting data, Elders / knowledge keepers, youth, planning team

What is the Purpose of Community Participation?

Community participation should get your community involved in the planning process. This ensures that development aligns with community goals. Input from a wide range of community members is important to make sure everyone has a chance to have their voice heard. Community participation provides the community opportunities to engage in the planning process.

What is Community Participation?

Before figuring out how to improve community participation, it is important to understand the definition and different forms. The International Association for Public Participation has adapted five stages of participation in a spectrum: inform, consult, involve, collaborate, and empower (Figure 1). The first stage, inform, has the least amount of participation. As a planning group, it is your responsibility to provide information to the public about what the problem is, and what options/solutions are being considered, and who to contact for more information. At the other end of the spectrum, collaborate and empower, the planning group works closely with the community and other involved groups to collectively make decisions.[1] For more information, see the link in the Further Information section titled "International Association for Public Participation (IAP2) – Spectrum".

What are some Common Issues?

To understand how to improve public participation, it is important to understand common issues. There are a number of small issues that can be challenging in the real world. First Nations often find engaging off reserve members, engaging the youth, and organizing effective on reserve participation[2] difficult. While these issues may seem like a mountain to overcome, know that low levels of community participation is common many First Nation and non-First Nation planning efforts. There are plenty of opportunities and methods to boost community participation.[3,4]

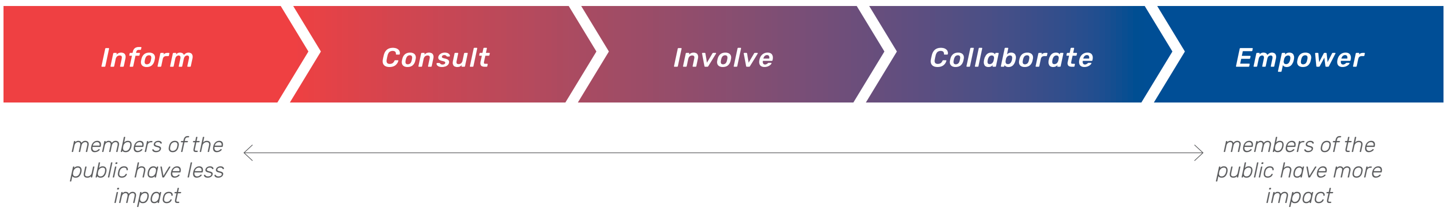

Figure 1 | *IAP2 Spectrum of Public Participation*

Tips to Get Started[13]

1. "While one branch may be strong, many branches together are stronger." A small committed group can make a much bigger impact and work more effectively together than any one person can alone.
2. Start with "small steps in the right direction" as opposed to planning for major progress all at once. This will help build trust and support in the community.
3. Expect resistance from the community, but do not be discouraged. People are resistant to change, and need time to accept new ideas. Keep moving forward with your committed group and, like pushing a snowball down a hill, momentum will build slowly with an initial push, but will grow on its own with time."

How to Improve Community Participation Attendance and Interaction

This fact sheet discusses how to involve people across long distances and how to prepare for in-person community participation, but does not discuss how to conduct community engagement. Below is a guide to improve attendance and interaction in community participation.

Who is Involved?

There are two key groups involved, internal and external. Your internal group lead and organize the planning process (see *Establishing a Planning Team* for more details). This includes members of the planning team and other band departments. These people could be students, teachers, school administrators, Elders, members of Band Council, or family heads.[5,6]

Your external group is made up of all people and groups you want to inform and engage in the planning process. This group can include members of the First Nation (on and off reserve), provincial and federal government agencies, neighbouring First Nations and municipalities, and other relevant interest groups.[7]

How is the Community Involved?

This question is best answered by you, since you are most familiar with the groups will be involved in the process. However, there are several key questions to ask yourself that can help you come to the answer. First, what level of participation do you want each group to achieve? Which method of participation will work for each group?

What kind of resources do you have to for promote engagement events and communicate with the community? Different First Nations will have different access to skilled team members, technology, and money for public participation. Other key questions to consider for each group are:

- What are the characteristics of the group?
- What is the message you want the group to understand?
- What is the information you want to receive from the group?
- What are the possible issues that may arise from involving this group or that may rise from the interaction with other groups?[8]

You might think through the items listed in Table 1 for each audience or group that is participating.

Table 1* | *Group details chart.
Adapted from (Centre for Indigenous Environmental Resources. "Communications Strategy Template." 2008. http://www.yourcier.org/uploads/2/5/6/1/25611440/ccp_training_session_3_-_communication_strategy_template.pdf. p. 3) *Used with permission.*

Audience	• The group or groups you want to share your message with
Characteristics	• current motivations • level of awareness • level of knowledge
Key Messages	• what you want to change • what you want to audience to know • what perception you want to create • what action you want as a result
Possible Issues	• the main concerns of your audience • how they influence others

Table 2* | *Communications chart.
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. p. 83.) *Used with permission.*

Who to share with	What to share	How to share	How often to share	Message	Content creator	Deadline	Status
On-reserve members							
Off-reserve members							
Youth							
Elders							
Staff							
Chief & Council							
Other communities							

Another way to think through community participation is with Table 2. This table is meant to help organize the process by assigning a leader and deadline to every task.

There are a variety of options to promote and conduct public participation. These range from in-person interviews to social media. Make sure each audience fully understands the issue being addressed and why it is important. They should also know why they are being contacted specifically, what it is they are expected to do, how to do it, and the details of where and when if necessary.

Get in Touch With Your Audiences[14,15]

- **Local Radio Station**
- **Local TV Station**
- **Print:** brochures, posters, letters, surveys, newsletters, reports
- **Word of Mouth:** home visits, open office hours, address at other community events, casual meetings
- **Internet and Social Media:** email, website, blog, on-line survey, Facebook, Twitter, Instagram

When Should Community Participation be Promoted?

Depending on what you are working on, you will use different engagement tools at different times. As you work with your First Nation and associated groups, you will gain a better understanding of methods that work well in different situations. However, there are a few basic rules and questions to help you determine your timeline.

First, do not commit yourself too soon. There will be a minimum time for you and your planning team to prepare for the public engagement.[9] Once this time frame is decided, it will be your minimum time to promote, communicate, and conduct long distance public participation. You will also need time to organize your planning team and develop content for the public participation, whether it is printed material, online material, or other. Again, this step will be determined by the resources available to you. Lastly, when are other community events and gatherings? These other events are great opportunities to spread the word of the project quickly and even to host a public engagement session.[10,11,12]

Further Reading

International Association for Public Participation (IAP2)

This organization provides resources and training for public participation leaders.

http://www.iap2.org/?page=foundations

The City of Edmonton's Bike Lane Projects is an example of an effective public participation process and has been included below for your reference. While it is a project in a big city, many of the methods used can be applied in a small community.

http://iap2canada.ca/resources/Documents/Conference/2015%20CORE%20VALUES%20AWARDS/CANADA%20--%20Extending%20the%20Practice%20Honorable%20-%20Edmonton.pdf

First Nations in BC Knowledge Network

This is a forum where First Nations can exchange information and learn from one another.

https://fnbc.info/org/comprehensive-community-planning-first-nations-british-columbia?page=1

Endnotes

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11 CIER, 2008.
12 Aboriginal Affairs and Northern Development, 2013.
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ENGAGING YOUTH

by Sonikile Tembo
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April 2018

Summary

This fact sheet discusses what youth engagement is, what the common issues are, and how to improve youth engagement in your community planning process. Engaging youth is important for your Indigenous community planning process because it makes sure all members of the community are aware and involved in your process.

Keywords: community engagement, collecting data, youth, planning team

Who are Classified as Youth?

Youth are generally the age group between childhood and adulthood. This usually refers to children within the mid teenage years to the mid-twenties. This definition can be used as a guide but should not restrict you if you want to include people a bit older or younger.

What is Youth Engagement?

Youth engagement is the meaningful participation and long term involvement of young people in an activity.[1] Appropriate and meaningful youth engagement supports the personal development of youth and can encourage community contribution and change. There is no single method of engaging youth. Engagement tools should always be changed to suit your community's current situation.

There is no single method of engaging youth. Engagement tools should always be changed to suit your community's current situation.

Why Engage Youth?

The general purpose of engagement is to make sure that the Indigenous community planning process reflects the needs of the community. Specifically, youth engagement is important because general engagement tools may not be effective enough to reach youth since they have their own specific interests and circumstances that are different from the community at large. Having community engagement tools that are specifically for youth will increase chances of successful youth engagement. The youth bring a unique point of view to the community planning process, and their involvement makes sure that the different needs of the community are being considered. Youth should be heavily involved throughout the planning process. The youth of today will be the leaders of tomorrow so it is important that they are engaged at a young age and gain a sense of ownership of the planning process and outcomes.

How Involved are Your Youth in the Planning Process?

Figure 1 uses a ladder[2] to show different levels of youth engagement.

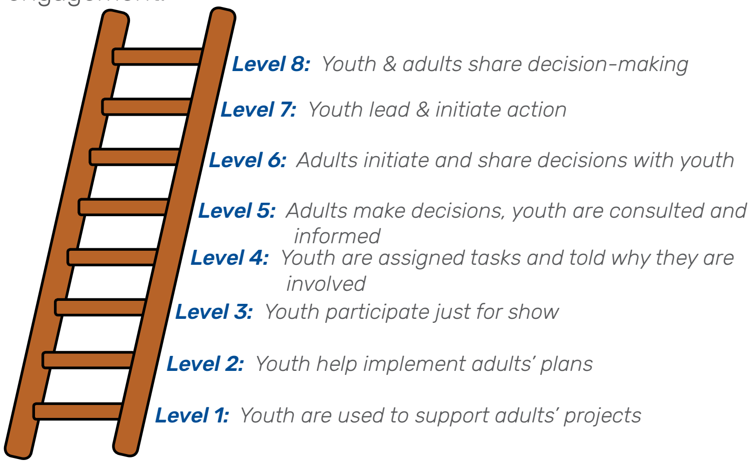

Figure 1 | Roger Hart's Ladder of Young People's Participation. *Adapted from* (Hart, Roger. "Children's Participation from Tokenism to Citizenship." Innocenti Essay no. 4, UNICEF International Child Development Centre, Florence. 1992. Accessed January 20, 2018. https://www.unicef-irc.org/publications/pdf/childrens_participation.pdf. p. 8.) *Used with permission.*

Levels 1 to 3 describe when youth are not engaged. Level 4 has minimal engagement and level 8 has full youth engagement. To find where your community is on this ladder, see step 1 in the next section. This will help you figure out how to engage your youth. An example of level 8 is when the youth are aware and involved in the planning process and feel they can come to meetings and participate in making decisions about the community.

How Can Youth Get More Involved?

The following 6 steps will guide you in planning for and carrying out youth engagement.

1 Assess Your Level of Engagement

It is important to have an idea of your level of youth engagement before figuring out ways to increase it. You can use the ladder of engagement referred to in the previous section to measure your level of engagement.

There are many other ways to do this assessment, including creative questionnaires, activities, games, community meetings for youth only, home visits and social media.[3] It is important that right from the beginning, the person or group of people involved in this process has some form of relationship with the youth. One way is to meet separately with youth that are in leadership roles, perhaps in their schools, and provide them resources to help conduct the necessary initial assessment. If this is not possible then a community member that has a good relationship with the youth can work with them during this assessment process.

Once your questions are answered and you know which level of the ladder you are, the next step is to create relationships and partnerships with the youth to help get to the next level of the ladder.

2 Establish Partnerships Between Youth and Adults

Partnerships are a source of Indigenous cultural teachings, they increase youth engagement as trust is built, and youth are empowered within these partnerships.[4] Adults must be willing to form meaningful connections with youth to establish trust relationships. These connections will encourage youth not only to get involved but stay involved.[5] Empowerment through partnerships can help create a sense of ownership for the youth and therefore make them more likely to receive responsibilities associated with the community planning process.[6] If they understand that they have the power to make significant changes in the planning process, they will step up and get involved in the process.

> *Adults must be willing to form meaningful connections with youth to establish trust relationships*

Building trust in partnerships takes time. A communication plan[7] can strengthen communication and help build strong partnerships.

3 Develop Goals, Objectives and Strategies

Once you know what level of the ladder you are on and begin the work of developing relationships, you will need to come up with some objectives to increase youth engagement (see *Setting Goals and Objectives* fact sheet). Good objectives will usually include what you want to do, how you will do it, how long it will take, who the leader of that role is and what you expect out of it.[8] Without objectives that show the specific ways you will engage youth, it will be difficult to make and track necessary progress. Table 1 shows an example of an objective to improve youth engagement. Your objectives can also include specific outreach and training for the youth. For example, Figure 2 shows tradition learning styles from an Indigenous community in Australia, but you could use your community's own traditions around teaching youth.

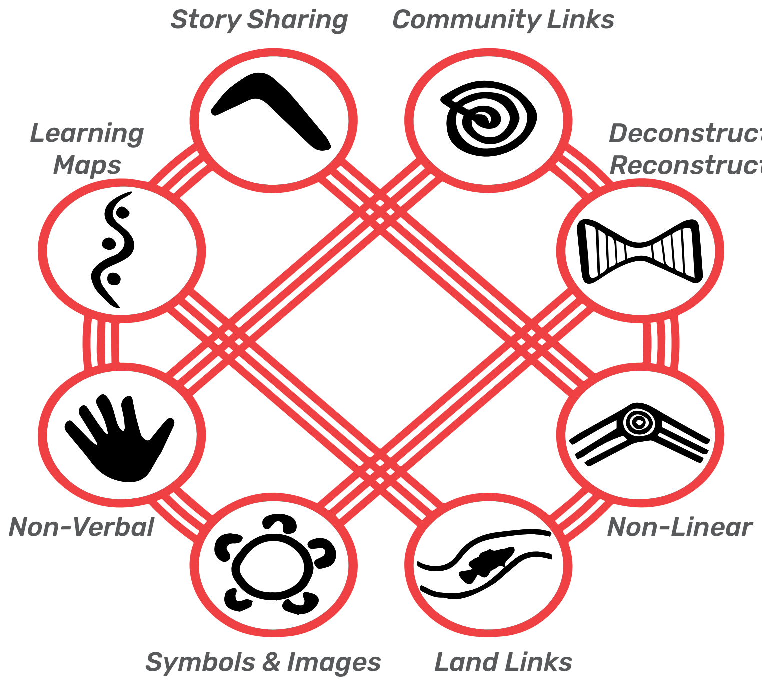

Figure 2* | *Eight Indigenous Ways of Learning.
Adapted from (New Learning. "Eight Aboriginal Ways of Learning." New Learning - Transformational Designs for Pedagogy and Assessment. . Accessed January 20 2018. http://newlearningonline.com/literacies/chapter-1/eight-aboriginal-ways-of-learning.) *Used with permission.*

4 Implementation of Engagement

The implementation stage is when the youth are engaged. It is the "Activities" column of Table 1. Common methods of engagement are community meetings, workshops, newsletters, questionnaires, home visits and small group meetings.[9] Youth typically respond to creative engagement methods involving social media, engagement with arts, games and activities. For more examples see *Youth Engagement Activity Ideas* on page 4. Having activities that involve them being mobile or vocal will engage them more effectively than having meetings where only one or two people talk. Be open to working with their ideas and interests. This is another opportunity to use your community's culture and traditions in the planning process!

Table 1 | *Develop Objectives.*
Adapted from (Crooks, Claire V. "Action Plan Template - Engaging and Empowering Aboriginal Youth: A Toolkit for Service Providers." Youth Relationships. 2010. Accessed January 20, 2018. https://youthrelationships.org/uploads/toolkit_text_-_english.pdf. p. 22.) *Used with permission.*

Objectives	Activities	Timeline	Lead Responsibility	Dates and Outcomes
Increase youth engagement with cultural traditions	Invite Elder to offer traditional teaching specifically for youth	Invite youth by April and have session in June	Program coordinator	Elder to attend program and teach youth once by the end of June
[Objective 2, etc.]				

5 Evaluation

Evaluation of the engagement methods and tools used is a good way to begin the planning process for the next youth engagement event. It is important to ask open questions (see Table 2), recognize any mistakes made, and learn from them. Consider drafting a questionnaire with questions that ask whether your objectives were achieved, if there were any concerns, and how concerns can be addressed to improve the engagement event. Consider the attendance of your event and the level of engagement and compare that with your method of engagement and whether a different method could encourage more participation. It is important to report the outcomes of the engagement to the youth.[10] Evaluation can be done by interviews, telephone, face to face, questionnaires or small group sessions to discuss "what we learned". See Further Reading for evaluation tools.

Table 2 | *Evaluating your youth engagement.*
Adapted from (Crooks, Claire V. "Types of Questions to Consider - Engaging and Empowering Aboriginal Youth: A Toolkit for Service Providers." Youth Relationships. 2010. Accessed January 20, 2018. https://youthrelationships.org/uploads/toolkit_text_-_english.pdf. p. 122.) *Used with permission.*

Closed Questions result in yes or no answers	Open Questions result in detailed answers
Did you find the program useful?	In what ways has the program helped you?
Has the program had an influence on your life?	What was the best part of the program?
Was the influence good?	What has changed in your life because of the program?

6 Celebrate!

Why should we celebrate all success, small or big? We celebrate because it provides us with encouragement and motivates us to continue with the work. As well, it increases the confidence of the youth to move on to bigger tasks and helps everyone focus on the results. The most common way to do this is a community feast. Alternatively, a smaller feast can be held as well with the youth only to celebrate their achievements, if they were involved in a specific project as part of the Indigenous community planning process.

What are Some Common Issues?

There can be many barriers and challenges to effectively engaging youth. These often prevent youth from being participants and leaders in the community engagement process. Some of these are listed below.

Other interests and demands

The youth may not be able to participate because of other commitments like school, recreational activities or employment. Consider these factors when planning for engagement to increase participation.

No trust

Youth will not participate in planning processes if they do not have trusting relationships with the adults conducting the processes. If the youth feel they are generally not prioritized as fellow decision makers, they will not participate. Unless they are safe and respected they may not care about the process because they feel their opinion doesn't matter.

Transportation

If they are not able to get to the meetings or activities, they will likely not make the effort to engage in the process. Making engagement events close to home, perhaps in a community center or school, will increase participation.

Role of adults

The role of adults in youth engagement must be restricted to guidance, setting up, advocating and mentorship.[11] The youth should have a sense of ownership of the planning process and outcomes.

Youth Engagement Activity Ideas

Drawing on maps: Youth can draw on maps of the community and talk about what they like and what they don't like. Drawing is a creative way to understand peoples desires.[12]

Dotmocracy: Show the youth ideas or designs and get them to vote on their favourite with sticky dots. This is a good option for groups that may not want to talk a lot.[13]

Birthday ice-breaker: Arrange people in groups according to their birthdays. Once these groups are formed, talk with them about what they like and not like about their community.

Storytelling: Have informal storytelling sessions where youth talk about what they like and remember about their community. You can use these to inform the planning process.

Social media: Use Facebook, Snapchat, or Instagram to create contests, games and treasure hunts with themes from the planning process to encourage youth to participate.[14]

Other

Youth may have individual relationship or social issues that prevent them from participating in community engagement. It is important to conduct an assessment (Step 1) to understand the challenges and barriers facing the youth in your community.

Final Thoughts

Engaging youth is a great way to build support and gather creative ideas for your Community Plan. Doing so helps make sure many different perspectives are reflected in your final plan. Engaging youth can be a fun way for all ages to interact, learn, and plan together!

Further Reading

Engaging and Empowering Aboriginal Youth by Claire V. Crooks

This resource provides various tools for engagement including a detailed Self-Assessment Guide. https://youthrelationships.org/engaging-aboriginal-youth-toolkit

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

This is a resource guide for community development. It provides a guide to establishing positive relationships and partnerships in section 4. https://www.publicsafety.gc.ca/cnt/rsrcs/pblctns/mvng-twrd-strngr-ftr/index-en.aspx#a19

Youth Engagement Toolkit Evaluation Tool by Province of British Columbia

This resource provides evaluation techniques. https://www2.gov.bc.ca/assets/gov/family-and-social-supports/data-monitoring-quality-assurance/information-for-service-providers/youth_engagement_toolkit_evaluation_tool.pdf

Endnotes

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8 CAMH, 2010.

9 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*, 2013, Accessed November 18, 2017, https://www.aadnc-aandc.gc.ca/eng/1377629855838/1377632394645.

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USING ORAL HISTORY

by Natalie Lagassé
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April 2018

Summary

This fact sheet provides information about how oral history can be a valuable tool for Indigenous communities seeking to include oral tradition in their community planning efforts. Oral history provides community planners with a tool to conduct background research on communities, a key step in the planning phase of community plan development. Oral history can help identify what shapes a community's cultural beliefs, social structures, and practices.

Keywords: community engagement, collecting data, managing / storing data, Elders / knowledge keepers, oral tradition

What is Oral History?

Oral history is a recording process that uses interviews to preserve memories, stories, and interpretation of events.[1] It documents historical and daily life events, and can be a tool to investigate how individual and community experience, identity, memory, and history influence a community's cultural beliefs, structures, and practices.[2] Because oral history reflects memories and an interpretation of events, it helps capture individual and community perspectives, behaviours, social influences, and ideology in a way other background gathering practices aren't able to.[3] Collected oral history can be analysed and interpreted, used to produce a timeline of historical events, and develop theories for why and how events occurred.[4]

Indigenous Oral Tradition

Like oral history, oral tradition is a recording process that preserves memories, stories and interpretation of events. But unlike oral history, oral traditions are typically not preserved in writing but are preserved through stories, song, and language. Indigenous cultural beliefs, social structures and practices are shaped by the information preserved in these forms, where many are considered the basis of Indigenous knowledge.[5] Indigenous knowledge is intimately tied to land, and is shaped by individual perspectives of events and experiences.[6] This knowledge is shared by oral tradition between families, communities and tribes, and over time becomes part of the collective oral tradition and an important tool in preserving Indigenous knowledge of land, resources and way of life.[7]

> *...oral traditions are typically not preserved in writing but are preserved through stories, song, and language.*

Why Use Oral History?

Using oral history allows planning initiatives to reflect the current and historical cultural setting of the community. By collecting various perspectives and viewpoints of events, oral history can supplement the information provided by public records, statistical data, photographs, maps, letters, and diaries.[8] This can be a useful tool to:

- Build a comprehensive story of the past;
- Understand how communities and people have experienced history;
- Understand what has changed over time; and
- Preserve a moment in time and memories of the past.[9]

Oral History Narrator

A person that is interviewed as part of an oral history project who has first-hand experience related to or has eyewitnessed an event related to the project topic.[18]

Research Methods

Key research methods to use when documenting and analysing oral history:[19]

1. ***Interviewing***: Used to collect information related to an event, this method helps capture personal experience and interpretation in the documentation of events.

2. ***Recording***: Provides a way to save interview information digitally (video and audio) and can easily be accessed for reference and review.

3. ***Transcription***: Used to turn the spoken word to written form and prepares the collected information for coding analysis.

4. ***Preservation***: Provides a way to store and preserve research data in a safe and accessible way.

How Can Oral History be Used?

The first step in the planning stage of comprehensive community planning requires background information be gathered to understand the current situation in the community. Oral history and oral tradition can provide a way to fill the information gaps in existing plans and studies, and help a community gather background information like:

- History/culture of the community and its role in the community;
- Programs, services, and community organizations;
- Infrastructure assets;
- Land and resource location, and surrounding areas;
- Activities on and uses of the land and available resources;
- Central leadership body and other leadership bodies; and
- Government relations (municipal, provincial, regional).[10]

Oral tradition could also help gather information on traditional Indigenous land use and occupancy. Land Use and Occupancy Mapping records cultural and resource geography, and links geography with oral traditions.[11] It collects individual experience on the land, records key land use and occupancy, and uses information gathered as background data for mapping exercises.

Who Provides Oral History?

The scope of an oral history project will determine who provides information and varies from project to project. Factors like age, sex, and background should be considered by community planners when selecting oral history narrators because they can significantly influence the information gathered.[12] Regardless of who provides the information, community planners need to consider and address any ethical concerns involved with interviewing people. Because oral history works closely with people and may deal with sensitive matters, ethical research relationship built on respect and trust must be established. When planning an oral history project community planners need to:

- Ensure informed consent;
- Commit to a long-range outlook;
- Be sensitive to relationships and reputations; and
- Deliver a correct representation of meaning expressed in the interview.[13]

If using oral tradition, community planners must also be sensitive to Indigenous traditions surrounding the sharing of knowledge. Indigenous knowledge is considered sacred, specialized, known by few, and shared only when in the best interest of the Indigenous culture.[14] Elders are the keepers of Indigenous knowledge and their permission is required prior to collecting oral traditions.[15] In addition, OCAP principles should be followed and respected.

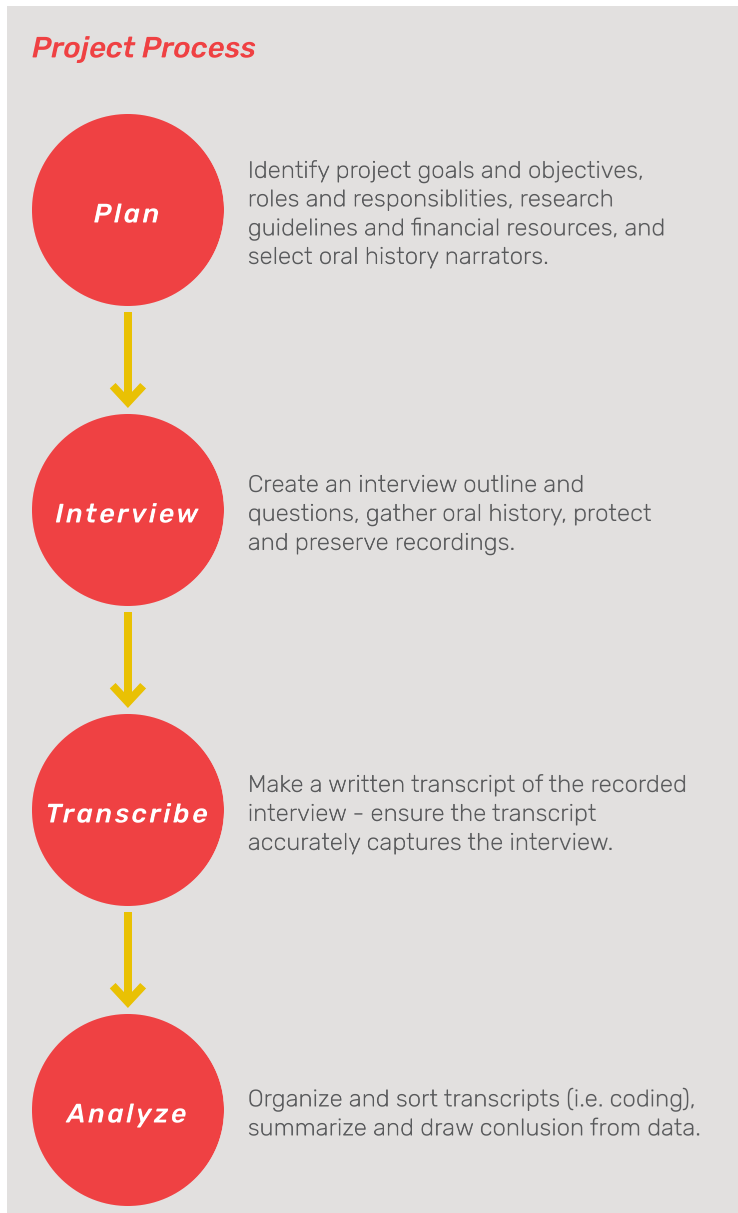

Figure 1 | Steps to complete in an oral history project

How do you Organize an Oral History Project?

Oral history projects are most successful when carefully planned. Planning helps community planners identify the resources, time, and skills required to complete an oral history project.

Determining why the oral history project is needed is key to developing the project goals. It helps understand what the project is looking to achieve, what community planners already know, and what is unknown.[16] Engaging with community members can help develop goals and objectives, and determine who would make a good oral history narrator for the project. Making a list of people who might be able to provide valuable information will help narrow the search for interview candidates. Be sure to set timelines for research, interviews, transcription and analysis to keep the project on track.

For more information on how to research preserved infomation, see *Conducting Archival Research.*

Community planners also need to think about how they will record interviews. This includes considering who will fund, purchase, own, use, and maintain the recording equipment.[17] Community planners should also determine if any legal documents are needed before interviewing oral narrators, as well as what will be done with the interview recordings after the project is completed.

Table 1 list some key questions community planners should ask while organizing an oral history project.

Final Thoughts

Oral history can be an important tool for communities in building comprehensive community plans. It can help fill the information gaps in existing plans and studies, and ensure a community's cultural beliefs, structures, and practices are reflected. Indigenous oral tradition can further help this by better representing Indigenous history and culture. By using oral history and oral traditions in background information gathering processes, Indigenous history and culture can be better integrated into the planning process.

Table 1 | Key questions to pose when organizing an oral history project

Adapted from (UNC School of Education. "Ten questions for planning an oral history project." Accessed January 8, 2018. http://web.archive.org/web/20160416075952/http://www.learnnc.org/lp/pages/765.)

What are your goals?	Thinking about project goals will help choose an appropriate project scope, set timeframes, determine oral history narrators, and use resources wisely.
How will you manage the time involved?	Thinking about how to plan your time will help allocate resources for research, interviewing, transcribing, and analysis.
Will partnerships be required?	Because oral history can be a long-term undertaking, community planners should determine if tasks like research, question-writing and interviewing may be better addressed with partnerships. Partners could include consultants, non-profits, universities, community groups, etc.
How will oral history narrators be selected?	Determining who will be interviewed may require consultation with community elders, local leaders, and community groups.
What will happen to the recordings after they are collected?	It is necessary to protect and preserve the recorded data. Determining how this will be completed while complying with OCAP principles is essential.
What equipment will you use?	Thinking about what information you will need to record, interview, transcribe and preserve information will help determine what resources will be required.
How will the interview be transcribed?	Thinking about transcription can help determine who will complete the task, determine resources, and set a timeframe.
What will be the final product?	Determining what the expected project deliverable will be helps set priorities and clarifies expectations.
How will oral history narrators be acknowledged?	Thinking about how to relay the project outcomes to interview participants helps ensure continued community participation in planning initiatives.

Further Reading

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

This handbook provides information on Indigenous community planning. Used in the Planning stage of CCP, oral history can be a used as a tool to gather community background information.

Chief Kerry's Moose: A guidebook to land use and occupancy mapping, research design and data collection by Terry N. Tobias

This guidebook provides an organized and easily understandable outline for collecting and mapping oral traditions, and guides community planners in designing land use and occupancy research.

Introduction to Oral History by Baylor University

This introductory workshop manual provides basic information of key elements involved in oral history projects. The manual can be accessed with the following link: https://www.baylor.edu/oralhistory/index.php?id=931751

Endnotes

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13 Baylor University, 2016, p. 4.
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18 Baylor University, 2016, p. 9.
19 Baylor University, 2016.

DEVELOPING THE VISION STATEMENT

by Jason Syvixay
Indigenous Planning Studio

Summary
This fact sheet describes what a vision statement is, its importance, how it is developed, and how it is used by a community.

Keywords: community engagement, reporting back, collecting data, managing the process, direction setting, Elders / knowledge keepers, youth, planning team, oral tradition

Vision Statements as Community Storytelling

Your vision statement for your community is like a story you share with your loved ones. Through stories, people talk about their history, their fears, their hopes for the future, and their differences. Through stories, people may share with others the reasons why they care about their neighbourhoods. Through stories, people can imagine what once was, and what is yet to come. Stories help lift people's spirits. They entertain, they give people hope, and they inspire. They put people in others' shoes. They motivate people to find answers and solutions. They help people reflect and reimagine. Stories can take people to different worlds, to different places where possibilities are endless.

People tell stories in many ways: through spoken word, literature, community gatherings, pow wows, song, dance, and more. A vision statement is just another way for people to share their stories. Figure 1 shows different things that make up a vision.

Vision statements weave together features such as language, values, beliefs, culture, and the land that we live on. Just as stories come in different shapes, sizes, and genres, developing the storyline about what is important for a community, the vision statement can be a challenge.

As kids, we grew up storytelling. As adults, we forget to tell stories - to imagine and dream- as we sometimes get stuck debating daily issues like road repair. People often want realistic plans and in this case, the "how" can become more important than the "why."

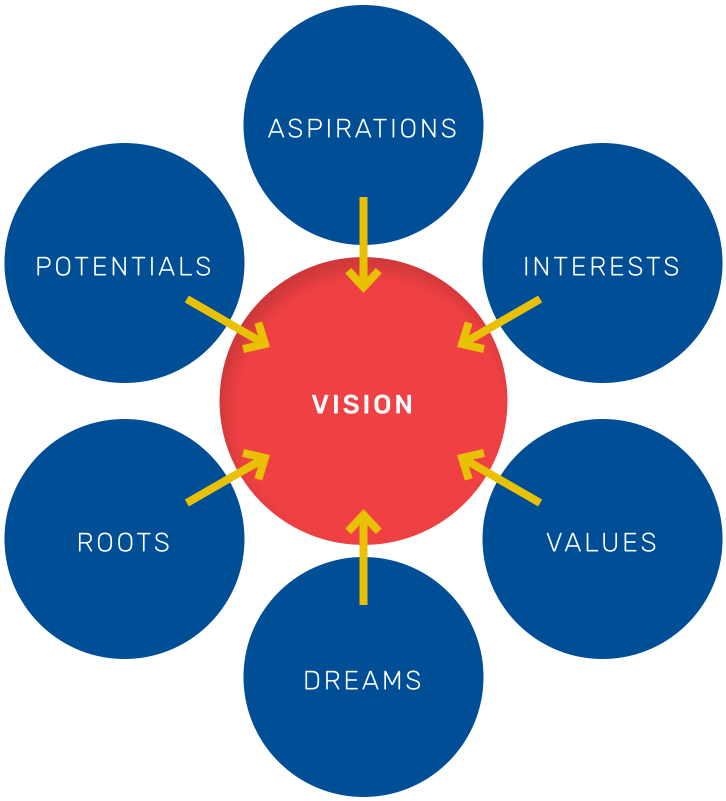

Figure 1 **|** *Driving factors of a vision statement.*
Adapted from (Indigenous & Northern Affairs Canada / Indigenous Services Canada. "CCP Handbook: Comprehensive Community Planning for First Nations in British Columbia, Third Edition." Digital image. 2013. Accessed October 11, 2016. http://www.aadnc-aandc.gc.ca/DAM/DAM-INTER-BC/STAGING/texte-text/ccphb2013_1378922610124_eng.pdf. p. 33.) *Used with permission.*

This thinking is perfectly summed up in Figure 2 from the Community Vision Handbook.[1] But without the "why" – the vision statement – the plan can become just a set of actions without a focus. The vision statement keeps the community focused. It is important that the process provides all relevant stakeholders an opportunity to participate.

The vision is the dream.	**The plan is the blueprint.**
The vision describes.	**The plan analyzes.**
The vision is poetry.	**The plan is prose.**
The vision is about possibilities.	**The plan is about policies.**
The vision describes what.	**The plan shows how.**
The vision is an aspiration.	**The plan is a legal document.**
The vision appeals to imagination.	**The plan appeals to reason.**
The vision is striven for.	**The plan is implemented.**

Figure 2 **|** *How the vision relates to the plan.*
Adapted from (Maine State Planning Office. "Community Vision Handbook." 2003. Accessed October 10, 2016. https://www.maine.gov/dacf/municipalplanning/docs/visioning.pdf. p. 5.) *Used with permission.*

"We will be a community with a strong and distinct culture, where our language, traditions, and the teachings of our ancestors live on throughout the generations. We will continue to be caretakers of our sacred and important places. We will gather often to celebrate and support each other."

– Excerpt from Gwa'sala-'Nakwaxda'xw First Nations Vision Statement

Inspiring Community Participation

Just like a story, the beginning is sometimes more important than the end. People might jump to the end of a book, but they often want to understand the reasons behind the conclusion. The same is true for vision statements. While the final statement is necessary for a community to move forward, consideration of how it was drafted and who helped to form it is necessary to ensure buy-in from a community. The vision statement process helps residents to take a realistic look at their community; not to assign blame but to establish an honest appraisal of what their community is.

By encouraging community members to participate early on in the visioning process, "the more likely they are to invest in its outcome and work towards its achievement."[2] When participants come together, it is important to ensure that one particular issue does not drive the entire visioning process. As one handbook on community vision states, "This process addresses where the entire community will be in the future, not how some individual issue will change. While these individual issues need to be examined and addressed, they should not be the sole focus of the community's vision."[3] Ensuring the "page is blank" and not predetermining outcomes of the visioning process will ensure that there is citizen buy-in from the onset and "because it needs to be the community's vision (not only the leadership or the administration's vision) to remain strong over time."[4]

"We are Syilx who receive our strength from our timix and encompass what is good for our livelihood. We are committed to our language and the teachings of our captiklw and respect that everyone has value and purpose to come together as one."

– Penticton Indian Band Vision Statement

Steps Towards a Vision Statement

Assessing Community Strengths/Weaknesses and Opportunities/Threats

Before your organize a community workshop and ask people to gather and participate, your planning team should create an outline for the visioning process. What questions will be asked of the participants? What information will be provided? It is important to get people thinking about community assets. Often, this can be done by asking community members to write/mark down on a map of their community what they believe to be the important strengths/weaknesses, as well as "information on economic, demographic, and social conditions."[5] Starting with this type of analysis can encourage participants to then think about what is missing, as they begin to answer questions like: "What types of changes do you think will happen in the next five to 10 years?"[6]

Visioning Exercise

CCP conducted a visioning exercise which focused on participants using their imagination. They asked participants to think about what was good about their lives, their communities, and the things they used to have in their neighbourhoods but have lost and want to get back. They asked people to picture in their minds what their community would look like at its best and to share these ideas and stories with other participants, using the following script:

So please take a minute now to close your eyes and imagine that you are a bird or in a plane soaring over the community, looking down on it 20 or 30 years from now. Imagine into the future when your grandchildren are starting to have families of their own. Think about what the community looks like at its best – what features does it have, what facilities, what are people doing, how to they relate to each other and to the land, what is the economy like, or the education and health services?

(wait approximately 1-2 minutes)

You can open your eyes now. Please share your ideas with the people at the table and have someone write down these ideas. We also have a piece of chart paper up on the wall here in case anyone wants to write down some of his or her ideas to share.

Community mapping is another effective tool when creating a community vision, particularly in small group settings and should "Start with a map of your traditional territory. Fill in existing communities, infrastructure, and activities. Then fill in what the community would like to see in the future: infrastructure development, cultural zones, traditional gathering areas, economic development opportunities, and others."[7] This exercise requires the facilitators to listen, not to educate, and to attempt to form consensus. This process will help in the development of a Vision Statement and is often similar to the work undertaken when developing a community plan.

For more information about community mapping, see *Mapping Assets* and *Building a Community Atlas*.

Writing the Vision Statement

After the mapping exercise, discuss the opportunities and their level of importance. This process should involve your entire community and give participants a chance to "select the scenario they believe best reflects their community's hopes and dreams."[8] Once the first draft is created, an opportunity for more fine-tuning and editing should be encouraged. The statement should be 2-3 paragraphs. Vision statements are broad descriptions of a community's values and beliefs, hopes for the future, and do not include specific actions, as those should be located in your Community Plan. The language in each of the statements below outlines the strengths of the community, and reflects on how to enhance and build on those assets. The vision statements are inclusive, incorporating words like "we," "us," and "our."

One process to create a vision statement is shown below. Keep in mind there are many ways to go about the visioning process.

1. **Establish a team to oversee visioning**
2. **Hold your first community workshop**
3. **Hold your second community workshop**
4. **Stay on track**
5. **Hold your third community workshop**
6. **Draft your vision statement**
7. **Hold your fourth community workshop**
8. **Market and make your vision a reality**
9. **Create an action plan**

Timeline

The time it may take for a community to form their vision statement varies from place to place. Some communities have the capacity and organizations to encourage public participation. Other places need to spend more time reaching out to community members. As one handbook on community visioning states, "many rural communities need between eight to 12 months to write a vision statement and another three to six months to have it widely adopted. With a larger population base and many organizations, urban and suburban areas may take shorter periods of time. There is no exact timeframe for the implementation of the vision statement. In general, vision statements should have a five to 10-year timeframe."[9]

Further Reading

CCP Handbook by Indigenous and Northern Affairs Canada

The Comprehensive Community Planning (CCP) Handbook includes practical tools to encourage community involvement and develop the plan based on the community's vision and goals. The final section includes funding, educational and planning resources to support the development and implementation of your community's plan.

http://www.aadnc-aandc.gc.ca/DAM/DAM-INTER-BC/STAGING/texte-text/ccphb2013_1378922610124_eng.pdf.

Ideas for Introducing Vision by Centre for Indigenous Environmental Resources

http://www.yourcier.org/uploads/2/5/6/1/25611440/ccp_training_session_1_-_introducing_vision.pdf

Endnotes

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2 The Center for Rural Pennsylvania, "Planning for the Future: A Handbook on Community Visioning," *The Center for Rural Pennsylvania,* 1998, Accessed October 11, 2016, http://www.rural.palegislature.us/visioning3.pdf.
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5 The Center for Rural Pennsylvania, 1998.
6 The Center for Rural Pennsylvania, 1998.
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8 The Center for Rural Pennsylvania, 1998.
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SETTING GOALS & OBJECTIVES

by Michael Blatz
Indigenous Planning Studio
April 2018

Summary
This fact sheet explains how goals and objectives are used in Indigenous community planning. Goals and objectives are an important part of a plan because they connect a community's overall vision with smaller action items.

Keywords: community engagment, communication tools, reporting back, collecting data, managing the process, direction setting, Elders / knowledge keepers, youth, planning team

What are Goals and Objectives?

Goals and objectives state what your community wants for its future. Both goals and objectives help you work toward your community vision, but they have important differences too. For more information about community visions, see *Developing the Vision Statement*. Your vision statement is the large long-term picture for your community's future. Goals are general statements that can be achieved in a medium amount of time. Each goal flows from your community vision and can focus on a topic like education, culture, or health. Objectives are more specific statements that work toward a goal in a shorter amount of time.[1]

Objectives break goals into smaller steps that have a clear, measurable purpose. Good objectives should be SMART:[2]

Specific:	they state exactly what you will do
Measurable:	you can show progress using evidence
Attainable:	they make sense for your community
Realistic:	they consider your community's ability
Time:	they have a specific deadline

To put it another way, "a goal is larger, bigger, and takes longer to reach. An objective is simply smaller goals," as shown in Figure 1.[3]

For example, if your community vision is to reconnect with your culture, one of your goals might be to revive your traditional language. Your objectives might be to find people who can teach the language in the next two months, create a teaching materials in the next four months, and advertise the class for six weeks. In this example, there is a broad long-range vision, a general medium-range goal, and three specific short-range objectives. The objectives follow the SMART system. They are specific because you know exactly what needs to be done. You can show that you accomplished each of them using evidence. These objectives are attainable and realistic if your community has the right people in place. They have specific times when they need to be finished.

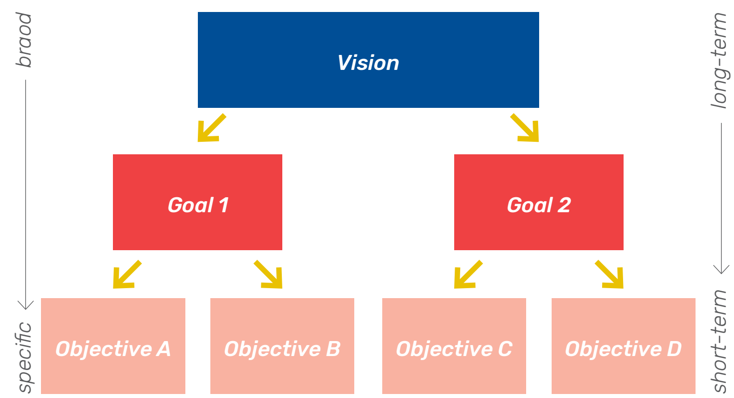

***Figure 1** | Heirarchy of direction setting.*

Why are Goals and Objectives Important?

Goals and objectives help community members and leaders who are often busy with day-to-day life to think long-term.[4] They set your community's path and connect your broad vision to smaller tasks.[5] Goals and objectives help your community:

1. Understand where you are today;
2. Decide which issues should be addressed; and
3. Guide decision-making.[6]

Goals and objectives structure your planning process by acting like a roadmap of where your community wants to go. When goals and objectives are decided on as a community, all members have a say. Community leaders have a duty to prioritize projects and issues that community members agreed upon.[7] Once your plan's goals and objectives are reached, you can use them to reflect on the plan's successes and challenges.[8]

Who Sets Goals and Objectives?

Your community members set goals and objectives.[9] Try to include Elders, youth, men, women, leaders, family representatives, on-reserve members, and off-reserve members to get the full picture of what your community wants. You may want to engage with different people in different ways and at different times. Once you have gathered information from your community, your planning team can organize it and look for common themes.[10] Depending on your community, your planning team may want to discuss these themes with the community before finalizing goals and objectives. This way, your community has a strong voice and your planning team makes sure the process stays on track.

How are Goals and Objectives Created?

Think about what you want to do in the next 5 to 25 years in different areas as shown in Figure 2.[12] There are many ways to approach goal-setting. You can start by thinking about your community's vision, values, planning areas, opportunities, trends, and issues. A few popular approaches are listed below:

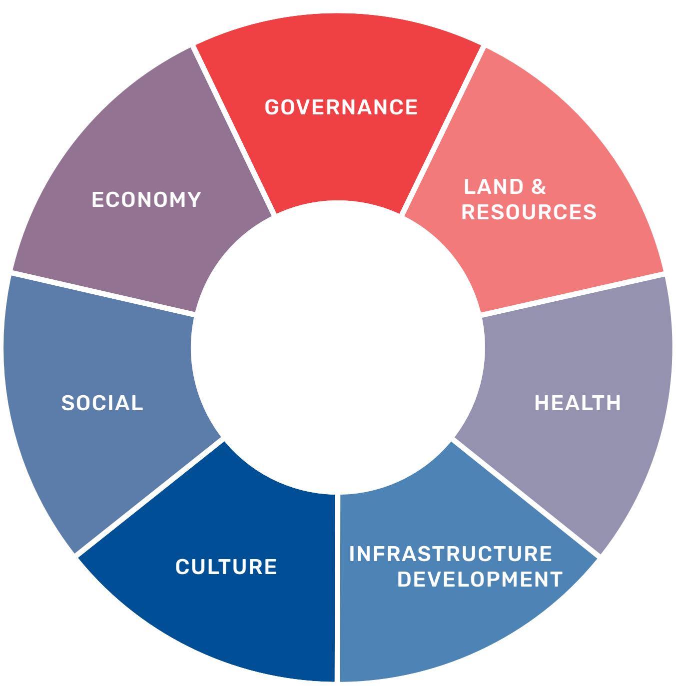

Figure 2 | *Planning Areas Wheel.*
Adapted from (Indigenous and Northern Affairs Canada / Indigenous Services Canada. "CCP Handbook: Comprehensive Community Planning for First Nations in BC." Digital image. 2013. Accessed October 24, 2017. http://www.aadnc-aandc.gc.ca/DAM/DAM-INTER-BC/STAGING/texte-text/ccphb2013_1378922610124_eng.pdf.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

Vision and Values Approach

This approach is based off your vision statement or traditional values. Cultural values like respect and wisdom might lead to a goal to be a community that cares for Elders' needs. An objective that works toward this might be building an Elders' lodge in the next five years.[13]

Planning Areas Approach

The CCP Handbook has seven key planning areas (Figure 3) that many Indigenous communities plan for. You can set a goal for any area that makes sense for your community. For example, a goal related to the economy might be to provide a variety of jobs for the community. An objective might be to set aside 5 acres of land for economic use by next year.[14]

Opportunities Approach

Your community can approach goal-setting by thinking about how to build on current or upcoming opportunities. For example, if your community is in the Treaty Land Entitlement process, you can set a goal to create an urban reserve. Objectives might include finding three possible sites in the next three months and brainstorming potential uses for each of them.[15]

Trends Approach

The trends approach uses current population and land use trends to think about what path the community is on. For example, if your community has a high population of children and the trend continues, your community's goal may be to build a new school. Because trends can change and this approach does not need much input from community members, it is best to use it sparingly.[16]

Issues Approach

The issues approach turns problems into positives. If community members often discuss their crowded living conditions, your goal might be to build more houses. Your objectives might include setting 40 acres of land aside for housing and teach construction skills to community members.[17]

For more information about involving young people in the planning process, see *Engaging Youth*. For more information about how to use traditional knowledge and teachings, see *Using Oral History*.

Once your community agrees on its goals, you can create objectives that work toward them. You may also choose to use any of these approaches together to create goals and objectives.[18]

It is important to make sure the process includes community members' ideas as much as possible. You can engage with community members in a variety of ways including open houses, workshops, surveys, or one-on-one meetings. Just make sure to use methods that make sense for your process and in your community.

When are Goals and Objectives Created?

Goals-setting usually happens in the planning phase. The CCP Handbook suggests that setting goals and objectives should be the fifth of seven steps in the planning phase:[19]

1. Gather background information
2. Complete community analysis
3. Create a vision statement and values
4. Build a comprehensive strategic framework
5. **Set goals and objectives**
6. Identify activities and projects
7. Create an implementation strategy

For more information about implementation strategies, see *Creating Action Plans.*

Figure 3 | *Kwikwetlem First Nation's illustrated vision.*
Source (Henderson, Tasha & Taylor, Meika. "The Community's Vision for the Future." Digital image. Kwikwelem. Accessed January 9, 2018. http://www.kwikwetlem.com/programs-and-services/ccp.htm.) *Used with permission.*

How are Goals and Objectives Shared?

Displaying your vision, goals, and objectives in a visual way can be very meaningful and powerful. These usually work best as summaries of your detailed written vision, goals, and objectives.

When you share your vision, goals, and objectives, feel free to get creative. You can use any combination of words, images, photos, drawings, or diagrams that are meaningful to your community.

Both Kwikwetlem First Nation (Figure 3) and Islands Trust in British Columbia (Figure 4) used a combination of words and drawings to communicate their vision, goals, and objectives.

Park City, Utah (Figure 5) used a diagram of a tree to show that their values, symbolized as roots, are the beginning of their process. The vision (trunk), goals (branches), and objectives (leaves) grow from the roots.

Final Thoughts

Goals and objectives are an important part of the planning process. They connect your community's broad vision to smaller steps and bring people together to talk about where they want your community to go.

Figure 4 | *Islands Trust's illustrated goals.*
Source (Orloff, Avril / Outside the Lines. "Islands Trust Visioning Session" Digital image. Islands Trust. 2016. Accessed January 9, 2018. http://www.islandstrust.bc.ca/media/342013/2016septembertcvision-graphic.png.) *Used with permission.*

For more information about engaging community members, see *Engaging Your Community.*

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

Westbank First Nation Community Plan by Westbank First Nation

This plan's vision and goals are guided by cultural traditions.

http://www.wfn.ca/docs/wfn-community-plan.pdf

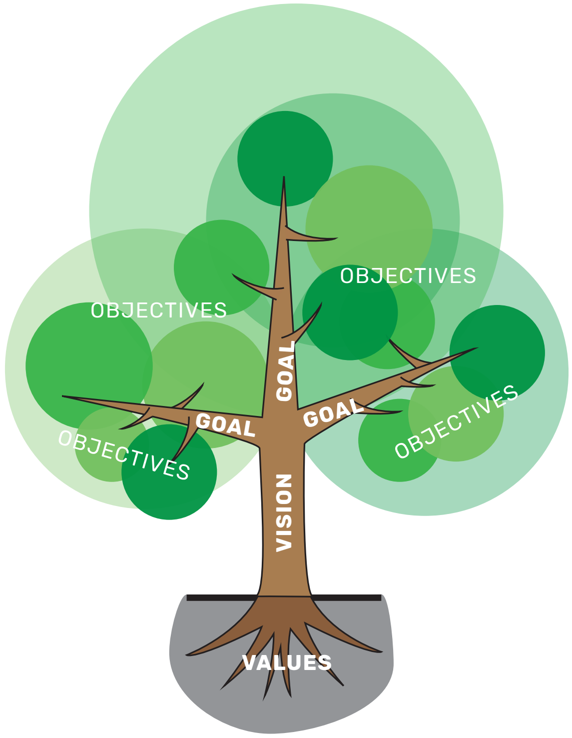

***Figure 5** | Park City's goals and objectives grew out from their values.*
Adapted from (Park City. Digital image. Strategic Planning | Park City, UT. Accessed January 9, 2018. http://www.parkcity.org/government/strategic-planning.) *Used with permission.*

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DEVELOPING LAND USE POLICIES

by Alex Hallbom
Indigenous Planning Studio
April 2019

Summary

This fact sheet explains the use of land use policies for incorporating broad community aspirations into the day-to-day use and management of land on reserve. The key steps in this process are (1) developing a policy area map which indicates the intended use of land, and (2) developing a set of policies that guide land use and development in each area.

Keywords: mapping, direction setting, collecting data, community engagement

What Are Land Use Policies?

Land use policies can provide a vision and regulations regarding the kind of land uses that are permitted in different parts of your community.

Your community's goals will determine what types of policies to include in your Community Plan. *Table 1*, below, shows how several First Nations categorize their lands. From this table, you can see several broad categories of land use policy areas: residential, natural, commercial, and protected areas. Each category may mean different things to different communities.

A Community Plan communicates land use policies in two related ways: (1) a map showing the location of policy areas, and (2) a written section detailing the vision and management direction for the different policy areas. The **vision** for each policy area provides high-level guidance on desired development patterns. The **regulations** for each land use provide a detailed list of permitted uses and constraints on form or intensity of development in the area.

Figure 1, on the following page, shows an example of a land use policy map from the Lake Cowichan First Nation on Vancouver Island. In this example, the planning area is a small reserve adjacent to a built-up municipality, so the map focuses on assessing appropriate sites for future development and protecting culturally significant areas.

Table 2, also on the following page, shows an example of land use policy regulations for "Natural Areas" from the Kitselas First Nation Land Use Plan[3]. Note the hierarchy of regulations, which grade from a broad

Table 1 | Example Land Use Policy Areas.

Lheidli T'enneh Reserve LUP[1]	Traditional Use Area; Cultural Heritage Site; Community Development Area; Community Development Expansion Area; Natural Resource Development Area; Environmentally Sensitive Area
Rainy River First Nation LUP[2]	Agriculture; Residential; Commercial; Community Use; Recreational; Natural Area; Cultural; Industrial
Kitselas LUP[3]	Cemetery; Community; Cultural Education; Cultural Tourism; Elders Housing; Future Residential; Housing; Industrial; Park; Natural Areas; Resource Use; Tourist Commercial; Village Special Management
Lake Cowichan First Nation Community Development Plan[4]	Mixed-Use; Residential; Cultural Reserve; Protected Open Space

vision to specific permitted uses.

It is helpful to include specific, enforceable, and measurable policies in your Community Plan so that the administration can interpret the document accurately.

Why Develop Land Use Policies?

You can create land use policies to implement the vision and objectives of a Community Plan. They are the framework that allows broad aspirations such as "protect wetlands" or "build more housing" to shape the landscape and your community.

Land use policies can alse serve a more generic role of reducing land use conflict in your community. By providing direction on the forms of development

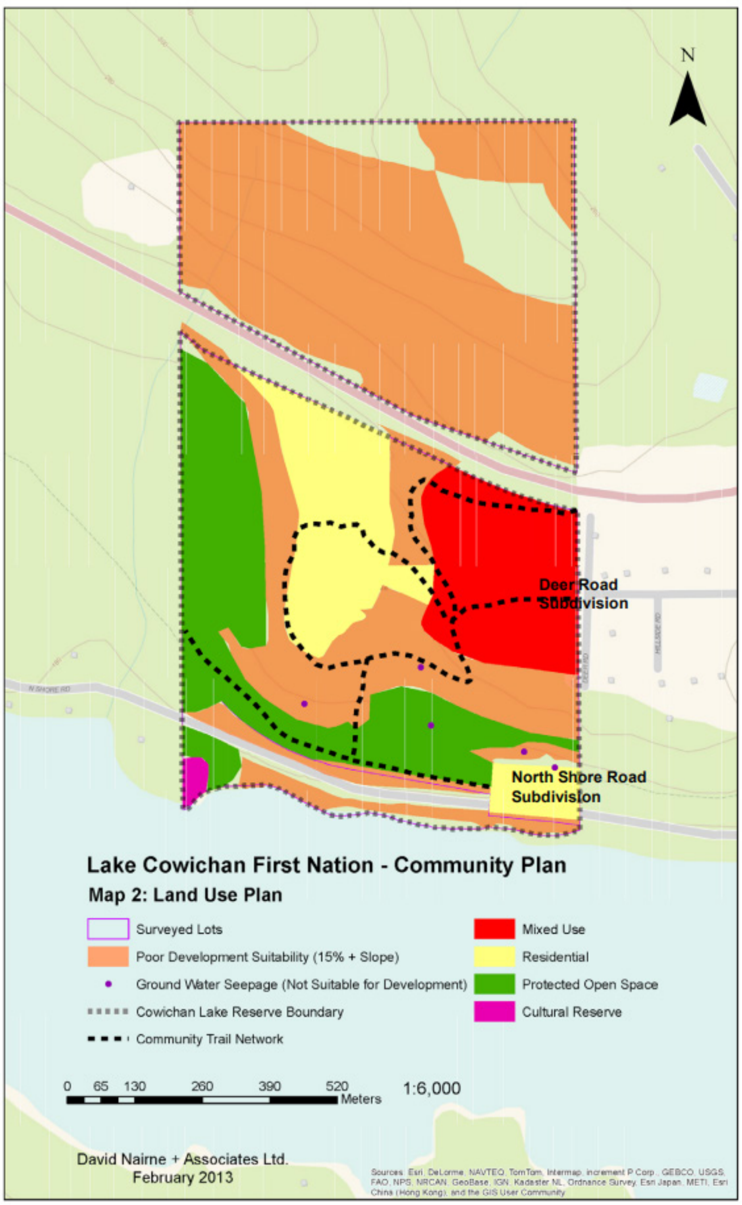

Figure 1 | Example Land Use Policy Map - Lake Cowichan First Nation[4]

that will occur in different areas, you can achieve the following goals:

- Manage conflicting priorities through separation of uses, such as industrial and residential.
- Direct development into suitable locations. E.g.: save money on piped services by concentrating houses in central areas.
- Preserve or enhance environmental or cultural characteristics by incentivizing or restricting certain forms of development.
- Provide certainty and predictability to an area by laying out clear and consistent development rules.

How Do We Develop Land Use Policies?

To create land use policies with broad community support, it is very important to draw upon information gathered throughout the planning process.

The planning team will conduct public engagement and technical studies to access information on community values and priorities, as well as topography, historic

Table 2 | Example Land Use Polices - Kitselas First Nation[3]

Policy Area Name	Natural Areas
Intent	• Provide for low-impact recreational and traditional uses.
Priorities	• Prohibit resource extraction, except Kitselas members may log on IR 5 for personal use, e.g. firewood. • Encourage separation of motorized and non-motorized trails and areas. • Encourage construction of hiking trails in IR 1 recreation areas.
Allowed Uses	• Non-motorized recreation • Traditional uses • Non-timber forest products collection • Timber removal for personal use on IR 5 only
Illustrative Examples of Allowed Uses	• Mushroom picking • Boating facilities • Fishing and hunting • On IR 5 only, firewood collection

land use, wildlife populations, existing services, and population projections. This information is usually stored, analyzed, and presented using Geographic Information System (GIS) technology, which your Lands staff or planning consultant may have training in.

Allow time for review of draft land use policies at community meetings and by other adminstrative departments. Developing land use policies is an interative process, meaning that you will likely produce several drafts for comment at engagement events. New information may require your planning team go back and gather more information (e.g. if a priority area for housing is identified in an area of unknown quality for constuction). An important point to note is that the plan is never done, only done enough! Make sure to balance the goal of a thorough and transparent process with time and funding restraints. Figure 2, below, shows an example of this cyclical process.

Conduct public engagement and technical studies

↓

Produce draft land use polices (map & regulations)

↓

Get community & technical feedback on draft

↓

Incorporate feedback and restart process

Figure 2 **|** *Planning Cycles*

Who Develops Land Use Policies?

You will want to consult a variety of stakeholders to ensure community buy-in and provide cultural and technical information. These include:

- Planning Team: Incorporates multiple sources of information to develop land use policy maps and regulations. Coordinates community engagements, departmental reviews, and manages contractors.
- Department Staff or External Consultant: Conducts technical studies and coordinates delegated aspects of the planning process.
- Elders: Provide cultural information to ensure proposed land use policies are in keeping with the priorities of your community.
- Community Members: Provide guidance and feedback to ensure proposed land use policies fit with community expectations and aspirations.
- Chief and Council: Provide political direction for Planning Team to develop land use policies.

Further Reading

BC First Nations Land Use Planning: Effective Practices[5] by Ecotrust Canada

This resource provides information on the Pre-Planning, Planning, Implementation, and Evalutation stages of planning. The sections on Policies and Land Use Designations (p. 33-36) are helpful for informing land use policies.

http://www.newrelationshiptrust.ca/wp-content/uploads/2017/04/land-use-planning-report.pdf

Community Land Use Planning Toolkit[6] by the National Association of First Nations Land Managers

This resource provides a practical aid for First Nations developing a Community Plan. This guide touches on developing land use policies and is written in plain english for non-technical experts.

https://nalma.ca/survey-and-land-use-planning

Endnotes

1. Lheidli T'Enneh, "Reserve Land Use Plan," 2015.
2. Rainy River First Nations, "Rainy River First Nations Land Use Plan," 2017.
3. Kitselas First Nation, "Kitselas Land Use Plan," 2012,
4. Lake Cowichan First Nation, "Community Development Plan," 2013,
5. Ecotrust Canada, "BC First Nations Land Use Planning: Effective Practices," 2009.
6. National Association of First Nations Land Managers, "Community Land Use Planning Toolkit," 2016.

CREATING SURVEYS

by Chantal Maclean
Indigenous Planning Studio
April 2018

Summary

This fact sheet is an introduction to creating surveys. It discusses the strengths and weaknesses of surveys, how to select questions, how to be sensitive to consent and confidentiality, and provides additional resources.

Keywords: community engagement, communication tools, collecting data

What is a Community Survey?

A survey is a tool for collecting community information during the Indigenous planning process. This information is used to direct the planning process towards the communities' needs.

A community that is beginning the planning process can use surveys to understand where they have been, where they currently are and where they want to go. Surveys allow you to access the information, desires and priorities of community members in a cost-effective way. The collected information will point the planning team in the direction the community wants to go and ultimately guide the planning process.

Why use a Community Survey?

During community planning, surveys are used to collect lots of information from the community. Depending on the type of information you want to collect, you can ask different questions. You may need to collect information on age, gender, marital status, or other demographic data that is used to give the planning team a comprehensive view of your community. Or, you may want to discover the priorities of community members. For example, would they rather have an ice rink or new community canoes? Surveys can be used to access information on nearly anything, including housing, infrastructure, health and nutrition, economic development, education, identity and governance. Surveys produce community relevant information that guide your planning process every step of the way.

When are Surveys Done?

Although surveys can be used during every stage of planning, they are most commonly used during the actual planning phase!

Who can Create a Survey?

Surveys are diverse tools that can be as simple or as complicated as you want them to be. Using online tools, you can easily create your own community survey – see Additional Resources for more information. You can also consult with a professional planner to help you design and administer your community survey!

For more information, see *Working With a Professional Planner.*

How do you Create a Community Survey?

1 Identify the information you need

Identify what information you want to collect.[1] Do you need baseline information from the whole community or do you want to know what community members think about a proposed hydro line? Identifying the information you need will help you decide which type of survey to use, which questions to ask, and how to select your sample.

Identify your target population. A target population is the group of people you want to collect information from.[2] For example, you might want information from all community members, on-reserve members, or youth.

Identify your sample. A sample is the portion of a target population you are going to survey. Getting 5,000 community members to fill out a survey is a huge task. Getting a sample of 500 community members to respond is more practical and cost effective. Your sample should be small enough that it doesn't go over budget, but big enough that it reflects the target population.[3] A general rule to keep in mind is the larger the sample size, the more accurate it will be.[4] To get an accurate representation of the target population in your sample, you should use random sampling.[5] This means that everyone has an equal chance of receiving a survey.[6]

2 Choosing Your Survey's Format

There are two main types of surveys:

- **Census survey**: a survey that is distributed to everyone in your target population. This would be used to gather baseline data or to plan for infrastructure.[7]
- **Representative survey**: a questionnaire is distributed to a sample of your target population. This sample will give you results that reflect on the entire population.[8] This tool is cost effective and practical.[9] This fact sheet will be focusing on representative surveys – but many sections are transferable to census surveys.

questionnaire

the document that contains your information and questions.[10] Survey respondents then record their answers on them and send them back.[11]

3 Designing Your Survey's Content

Introduction paragraph: Every questionnaire should have an introduction paragraph. This paragraph should explain what information you're looking for, why you're looking for it, who should complete the survey, and what will happen with the resuts.[12]

The first step in writing good survey questions is identifying what exactly you want to know.[13] There are several different kinds of questions that can be used to uncover different information. Select the type of question you use based off the information you need and your analysing ability. Different questions require different analysing tools.

Types of Questions

- **Filter questions**: These are additional survey questions that are only relevant to a certain section of respondents.[14] See example below

10. Do you ever use the reserve's community centre?
    - ☐ Yes [If yes, answer questions 11 and 12]
    - ☐ No [If no, skip to question 13]
11. How often do you use the reserve's community centre a week?
    - ☐ Less than 1 time per week
    - ☐ 1 - 2
    - ☐ 3 - 4
    - ☐ 5 - 6
    - ☐ 7 +
12. What facilities do you use at the reserve's community centre? (check all that apply)
    - ☐ Gymnasium
    - ☐ Ice rink
    - ☐ Youth lounge
    - ☐ Canteen
    - ☐ Studio
13. Do you ever use the reseve's elders lodge?
    - ☐ Yes
    - ☐ No

Figure 1 **|** *Example of filter questions in a survey*
Adapted from (Blackstone, A. "Principles of Sociological Inquiry: Qualitative and Quantitative Methods." Saylor Academy. 2012. https://saylordotorg.github.io/text_principles-of-sociological-inquiry-qualitative-and-quantitative-methods/s11-survey-research-a-quantitative.html#blackstone_1.0-ch08_s04_s01_f02).

- **Open-ended**: These are questions that require a respondent to answer in their own words.[15] These questions provide deep and meaningful information, but are often harder to analyse.[16] Example: Why do you think community centres are important?
- **Close-ended**: These questions require only a brief answer, often either "yes" or "no".[17] Close-ended responses provide data that is easy to analyse.[18] Example: Do you think community centers are import? Yes or No.
- **Multiple choice**: This type of question allows the respondent to select between a variety of responses.[19] Example: How often do you use the community centre?
  A. Never B. Once a year C. 2-11 times a year
  D. Monthly E. Weekly
- **Likert Scale**: This type of question requires participants to rate items on a scale.[20] Example: Crime is a problem in the community.
  1 = strongly disagree 2 = disagree 3 = agree
  4 = strongly agree

Questions to Avoid

- **Double negatives:** These questions that have two negative words.[21] This makes the question confusing and hard to read. Example: Do you think council shouldn't not buy more land?
- **Leading Questions:** These are questions that can sway a participants' response.[22] Example: Working on council is very difficult and time consuming. How much do you think council members should be paid?
- **Double Barrel Questions:** These are questions that are asking two things at once.[23] Example: "Are you happy with housing and postal services?" This should be separated into two questions.
- **Response options that are not exhaustive:** This means that there could be more response options than you are providing. A simple way to ensure your response options are exhaustive is to include an "Other" option, with a space to write.[24]
- **Response options that overlap:** Questions with overlapping responses are confusing and can skew your results. Example: How old are you?

  1-20 20-30 30-40 40-50

  If someone was 30, they would fit in two groups. This would confuse survey participants. Instead use a scale that doesn't overlap!

  1-19 20-29 30-39 40-49

4 Pretesting

Pretesting is when you give your survey to a small group of people to gauge how user friendly it is.[25] This is done before you administer your survey to the target audience. You should pretest on people who represent your target audience. Ideally, you should also have easy access to these people.

Pretesting helps you:
- Identify confusing, offensive, boring, or pointless questions
- Get feedback on question ordering
- Get feedback on survey length and design

5 Administration

There are several ways of administering a survey:

Delivery in person

The survey can either be completed on the spot or an arrangement can be made to pick it up later.[26] In person delivery typically provides a high response rate.[27] Door to door survey delivery can also provide community employment opportunities.

Snail-mail

Although this is both practical and convenient, response rates may turn out low.[28] It's harder to convince someone to take the time to fill out a survey when the researcher isn't standing there asking them to.

If snail-mail is the selected administration tool, a follow up letter will serve 2 purposes:
- Thanking those who have already returned the survey
- Reminding those who haven't filled it out yet.[29]

Online

This method of delivery is becoming increasingly common. It is easy to use, cheap and much quicker than knocking on doors.[30]

Considerations for using an online survey:
- Does everyone in the community have internet access?
- Do you know everyone's email address?

Telephone

This method is becoming increasingly difficult as landlines become obsolete.[31] You may be able to get phone numbers from local white pages or you may need to work with a consultant to obtain phone numbers.

6 Analysing

Different questions require different analysing tools.

For more information, see *Analyzing Surveys.*

7 Implementation

After you've analyzed your survey results, you will have summary information about your community. Depending on the questions you asked, this can be demographic information, community concerns, requests, or other data. This information can inform and direct your Community Plan! Taking action based on survey results guide the plan in the direction that is best for the community, while also showing community members that you are listening to them!

Taking action based on survey results guide the plan in the direction that is best for the community, while also showing community members that you are listening to them!

What About Confidentiality?

Is your survey going to be anonymous or will you ask for information that will allow you to identify the participant?

Participants may be more inclined to give honest answers when they take a confidential survey.[32] However, you might need identifying information to give away incentives or compare survey results to service records, background information or other documents.[33]

Including identifying infomation doesn't have to be a deterrent. If you request identifying information, just explain why you need it!

Examples of Using Survey Data in the Planning Process

Demographic Data

Through your survey results you may see that there is an average of 7 people living in one house on the reserve. You can use this demographic information to plan the number of additional houses that need to be built!

Community Concerns

The survey may reveal that community member are concerned about the lack of light around the community centre at night. You can use this to plan future infrastructure, such as building new street lights!

Community Requests

Your survey results may tell you what your members want to see in their community. For example, if a large number of members want a healing lodge built, you can use this to plan future spending and infrastructure!

What About Consent?

Consent forms are typically not necessary for surveys.[34] Although, in certain circumstances they are advised:

- Working with children or others who cannot legally provide their own consent. A consent form should be signed by their legal guardian[35]
- Using the results for publication. If you will be making survey results public, you should ensure your participants are aware and consent[36]

When Should You Use a Survey?

Surveys are a good tool when:

- You're looking to gather lots of information in a cost-effective manner
- You have well defined questions with a limited range of responses
- You have the contact information for the people you would like to survey
- You're collecting information on a sensitive topic

You might consider other tools when:

- You want information from people with limited literacy skills such as young children
- You need detailed information. Surveys are not flexible because potential answers to questions are fixed. For example, a respondent's answer may be more complex than a simple "yes" or "no"
- You only need information from a few people. A small number of people surveyed (sample size) has the potential to skew the results
- When return rates may be low – Discussed in Administration of the Survey section
- You do not have a way to contact participants.

Tips for Success

- make the surveys look attractive
- be brief and to the point
- make the font size readable
- make sure the instructions are very clear

Further Reading

Survey Monkey

An online tool used to create free surveys!

https://www.surveymonkey.com

Community Tool Box - Creating Surveys by Chris Hampton & Marcelo Vilela

This online resource provides an indepth guide to creating comprehensive surveys!

http://ctb.ku.edu/en/table-of-contents/assessment/assessing-community-needs-and-resources/conduct-surveys/main

Endnotes

1 Wilder Foundation, "Survey says: The role of surveys in your evaluation. Tips from Wilder Research program evaluation workshop series," *Wilder Research*, 2009, http://www.wilder.org/Wilder-Research/Publications/Studies/Program%20Evaluation%20and%20Research%20Tips/Survey%20Says%20-%20The%20Role%20of%20Surveys%20in%20Your%20Evaluation%20-%20Tips%20From%20Wilder%20Research%20Program%20Evaluation%20Series,%20Fact%20Sheet.pdf.

2 Chris Hampton & Marcelo Vilela, "Section 13: Conducting Surveys," *Community Tool Box*, 2017, Accessed November 15, 2017, http://ctb.ku.edu/en/table-of-contents/assessment/assessing-community-needs-and-resources/conduct-surveys/main.

3 Wilder Foundation, 2009.

4 Hampton & Vilela, 2017.

5 Hampton & Vilela, 2017.

6 Hampton & Vilela, 2017.

7 Hampton & Vilela, 2017.

8 Hampton & Vilela, 2017.

9 Hampton & Vilela, 2017.

10 Amy Blackstone, "Principles of Sociological Inquiry: Qualitative and Quantitative Methods". *Saylor Academy*, 2012, https://www.saylor.org/site/textbooks/Principles%20of%20Sociological%20Inquiry.pdf.

11 Blackstone, 2012.

12 Hampton & Vilela, 2017.

13 Blackstone, 2012.

14 Blackstone, 2012.

15 Hampton & Vilela, 2017.

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18 Hampton & Vilela, 2017.

19 Hampton & Vilela, 2017.

20 Hampton & Vilela, 2017.

21 Blackstone, 2012.

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25 Blackstone, 2012.

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27 Blackstone, 2012.

28 Blackstone, 2012.

29 Blackstone, 2012.

30 Blackstone, 2012.

31 Blackstone, 2012.

32 Wilder Foundation, 2009.

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35 Wilder Foundation, 2009.

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ANALYZING SURVEYS

by Lissie Rappaport
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April 2018

Summary

This fact sheet outlines how to analyze survey results, why analysis is important, and how to interpret different types of data. Analyzing survey data is an important step after conducting a community survey because it can help you move from the information gathering stage into making decisions as a planning team.

Keywords: community engagement, communication tools, managing / storing data, analyzing data

What Is A Survey?

A survey, or questionnaire, is a tool that draws from the most important source of information – the people in your community. They can be used to gather statistics on your community or opinions and concerns of members.

See *Creating Community Surveys* to learn more!

What Is Data Analysis?

Once you've conducted a community survey, you have a set of responses, or 'data.' Data analysis is the process of turning this 'data' into 'findings' (what does it all mean). It's like listening to a story and pointing out what the lesson is.

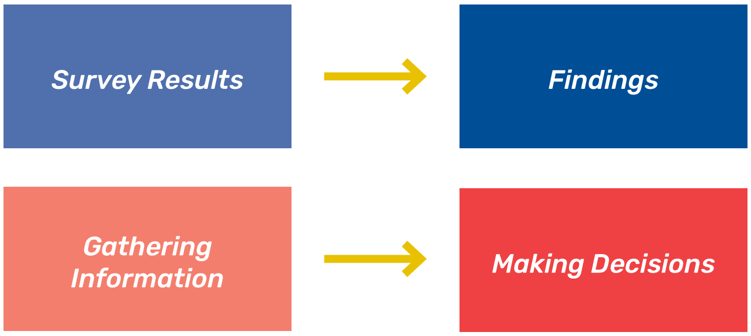


Figure 1* | *What is data analysis?

Why Analyze Survey Data?

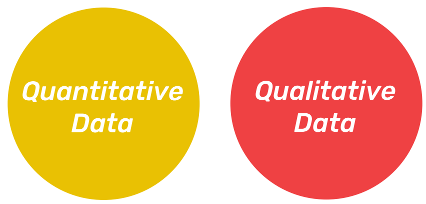
Analyzing survey data helps make sense of results. It summarizes survey responses into a format that can be shared back to the community or used by your planning team. It can help your planning team make decisions and understand what is important to your community. It can help you move forward in your planning process from gathering information to setting priorities.

When Do You Do A Survey and Analysis?

As community engagement is important at any stage of the planning process, surveys can be used at any phase to involve community.[1] Most often, they're used at the planning stage to gather background information or feedback from the community.[2] They can also be used at the implementation stage to gather feedback on the planning process or how the community may have changed over time.[3] Data analysis happens once you've finished conducting your survey and you want to understand how to move forward.

What Types of Data Are There?

Some surveys gather **quantitative data** (eg. a community census) while others gather **qualitative data** (eg. opinion survey). Many surveys will include both.



Quantitative Data

Quantitative Data refers to numbers or data collected through close-ended questions (yes/no, multiple choice questions).[4]

Example Question: Which of the following is your top priority for the community?
a) Housing b) Recreation c) Jobs
d) Food security e) Road access

Results: You will get a certain number of responses for a, b, c, d, and e and can add each up.

Table 1 | Benefits and drawbacks of quantitative data.

Benefits	Drawbacks
Basic analysis can be quick and easy	More detailed analysis might require statstical expertise
Findings can be concrete and not subject to bias	Doesn't answer the 'why'[6]

Qualitative Data

Qualitative data refers to written words or data collected through open-ended responses.[5]

Example Question: What is your top priority for the community?

Results: You will get many sentences as responses, such as: "I feel like there should be a new recreation centre for youth to go to after school."

Table 2 | Benefits and drawbacks of qualitative data.

Benefits	Drawbacks
You can use your own knowledge to interpret results	Can be time consuming
Can capture information you might have never thought of	May be subject to bias
	Findings are specific to the people who responded an may not represent the whole community[7]

How Do You Analyze Survey Data?

1 Focus your analysis

Your analysis will be informed by what you want to get out of it. Think about the original purpose of the survey and what you wanted to find out.[8] Remember this throughout the analysis. You can also place Indigenous world views at the centre and analyze responses from this perspective.[9]

2 Prepare your data

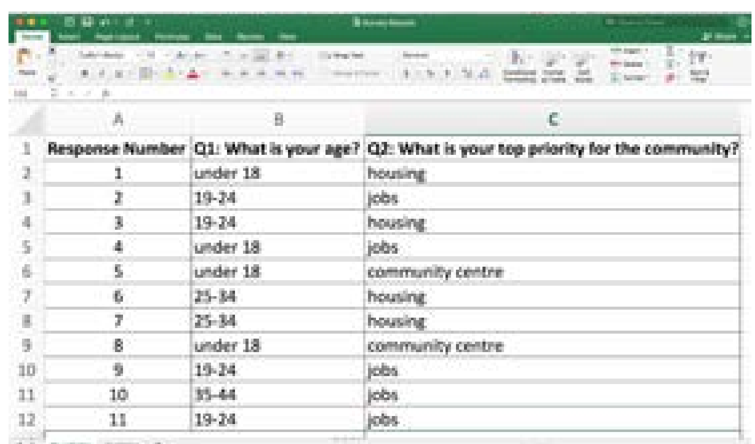
Get to know the data, what was asked, and how many responses there were.[10] The easiest way to go through it will be on the computer, in a program like Microsoft Excel. If your survey was done on paper, type in responses to the computer. If it was done online (ie. Survey Monkey), you can download the results and add to Excel. See Figure 2 for a sample of Excel data.

Tips for Success

- Type all answers from one survey (one person) in the same row so you can compare responses from that person together (see Figure 2).
- If you gathered both qualitative and quantitative data, it's helpful to enter these separately – you can use separate "sheets" in Excel.
- Once the data is typed up, check for mistakes – or have another person double-check it for you!
- See *University of Wisconsin's Using Excel* for a beginner's guide on using the program.

3 Analyze it!

Decide what type of data you have - quantitative or qualitative - to see how you will analyze it.



Response Number	Q1: What is your age?	Q2: What is your top priority for the community?
1	under 18	housing
2	19-24	jobs
3	19-24	housing
4	under 18	jobs
5	under 18	community centre
6	25-34	housing
7	25-34	housing
8	under 18	community centre
9	19-24	jobs
10	35-44	jobs
11	19-24	jobs

Figure 2 | Sample Excel spreadsheet of survey data
Adapted from: (University of Wisconsin-Extension. "Using Excel for Analyzing Survey Questionnaires." University of Wisconsin-Extension. 2004. https://learningstore.uwex.edu/Assets/pdfs/G3658-14.pdf. p. 21.) *Used with permission.*

How Do You Analyze Quantitative Data?

For quantitative data, you can use math equations to give meaning to responses. If you're using Excel, many of these are "formulas" that the program will do for you. Some common equations are described below.

Percentages

Percentages show what proportion a response is out of the total (translated in a value out of 100).[11] They can be useful to compare responses.

> **Example**
>
> **New community centre support** (n=56)
>
> 75% of people want a new community centre
>
> 25% of people don't want a new community centre

> **Tips for Success**
>
> When reporting percentages, it's helpful to show the total number of responses using the letter n=#. It shows how many are represented in the percentage.

Averages

Averages show the most common value. They can be used to show the most common response from a scale in a multiple-choice question, rather than what was the highest response. You can calculate this by assigning values to each response.[12]

> **Example**
>
> **I think there should be a new community centre in the community.**
>
> a) Strongly Agree b) Agree c) Neutral
> d) Disagree e) Strongly Disagree
>
> The average response is "Agree."

> **Tips for Success**
>
> See *University of Wisconsin's Analyzing Quantitative Data* for directions on how to calculate percentages, averages, and other equations.

How To Analyze Qualitative Data?

There is not one way to do qualitative analysis. It is a process of reading, interpreting, and then trying to understand what it all means.[13]

There is the possibility for bias in qualitative analysis because the person interprets data through their own knowledge. To reduce bias, have multiple people read through the findings or hold meetings with your planning team as you analyze results.[14] But, because you interpret data through someone's experience, there is an opportunity to bring in Indigenous perspectives. You can frame issues through your world view and what's important to your community.[15]

> **bias**
>
> favouritism towards one response or idea, usually in a way that is considered unfair.

In general, you can follow the steps below[16]:

Code the data

↓

Organize the themes

↓

Interpret the themes & bring it all together

Code the data

This step involves reading results and identifying themes or ideas. These themes are your categories (and sub-categories) that help sort what is being said. It can be helpful to print out the responses and write your themes and notes on the margins. Be sure read through responses more than once so you don't miss anything. Keep a list of each theme and its definition to help explain how you came to your conclusions. And remember, responses can fit in more than one theme.[17]

Organize the themes

Collect your list of themes and see if you can combine any or make sub-themes. Rewrite the definitions for new themes.

Interpret the themes & Bring it all together

Once you have your list of themes, sub-themes, look beyond to see key ideas or values in them. Point out connections between themes, like similarities or differences. Look for overlap and connections – you may discover that two or more themes appear together often (ie. education and jobs). Summarize the themes and point out what the major learnings are.[18] This summary can serve as the beginning of your survey report.

Example

1. Code the data

What kind of opportunities for youth would you like in the community?	CODES:
I want to see high-school kids getting more opportunity to play sports or learn music in school.	High-school programs, sports, music
High-school kids aren't getting enough after-school recreation. There should be places, like a centre, where they can go to be together.	Recreation, youth centre
I would like to see cultural programming and chances for youth and elders to learn from each other.	Cultural programs, elders
The kids need tutoring programs after school to help them graduate and get good jobs.	Tutoring, jobs

2. Organize the themes

Combine high-school programs and recreation into a general theme, with sub-themes:

Theme: Youth programs

Sub-themes: sports, music, youth centre, cultural programs, elders, tutoring, job-readiness
(Don't forget to write out definitions for themes!)

3. Interpret the themes & Bring it all together

People in the community want there to be programs for youth in a wide range of areas, including recreation, tutoring, and cultural programs. There were suggestions for a centre for youth to gather, sports and music programs, and opportunities to connect with elders. People pointed out the importance for education programs and jobs.

Tips for Success

- You can count the number of times a theme or sub-theme is mentioned. This can help point out importance. But remember even a theme mentioned only once can still be important!
- Compare themes with demographics (ie. 60% of those under 18 wanted a new community centre).
- See *University of Wisconsin's Analyzing Qualitative Data* for step-by-step instructions on how to code and interpret data.

How Do You Share Results?

Once you've analyzed your survey data, it's important to share your findings with your planning team and back to the community. Write a report that your planning team can use to move forward and a shorter report (2-4 pages) to share with the community. Remember the purpose and focus of your survey to help you decide what to include in the report.

Tips for Success

- Try using visuals in your report to make it more accessible (see Figure 3).

Figure 3 **|** *Sample 'Word Cloud' visual for a report*
Source: (Australia Council for the Arts. "Engaged Audiences' Image of Aboriginal and Torres Strait Islander Arts." Digital Image. Building Audiences: Aboriginal and Torres Strait Islander Arts. August 20, 2015. http://www.australiacouncil.gov.au/research/building-audiences-aboriginal-and-torres-strait-islander-arts/)

Further Reading

Using Excel for Analyzing Survey Questionnaires by University of Wisconsin

How to use Excel and a range of formulas for analyzing data

https://learningstore.uwex.edu/Assets/pdfs/G3658-14.pdf

Analyzing Quantitative Data by University of Wisconsin

Details on descriptive statistics – percentages, averages, rankings, and more. Shows when and how to use them

http://learningstore.uwex.edu/assets/pdfs/G3658-6.pdf

Analyzing Qualitative Data by University of Wisconsin

How to analyze qualitative data with step-by-step instructions

https://learningstore.uwex.edu/assets/pdfs/g3658-12.pdf

Endnotes

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CONDUCTING PRECEDENT STUDIES

by Breanne Jack
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December 2016

Summary

This fact sheet discusses how your community can use precedent studies in your planning process.

Keywords: communication tools, collecting data, analyzing data, planning team, funding, building capacity

What is a Precedent Study?

A precedent is an example for future projects.[1] You can use a precedent study or case study to look at plans and projects done by a similar community. By doing this, you will learn more about the process and end results.[2] By the end of the study, you will see if a similar project would work in your community. Precedent studies explore a plan, project, program, event, activity, or process in detail.

A precedent study looks at best practices or the best example for different planning activities. Your community can learn from the best practice to learn from their experience. You can try to improve upon the project and possibly become the new best practice. A precedent study can generate ideas for a new project and help guide your community through the process. Precedent studies give insight into how another community has approached a similar task.[3] You can use precedent studies for many things, from developing a piece of land to starting a recycling program.

precedent

something that can be used as an example to be followed in the future[9]

Who Does a Precedent Study?

Any community, Indigenous and non-Indigenous, planning firm, architect, or community member can conduct a precedent study.

"The basic idea is that one case will be studied in detail, using whatever methods seem appropriate."[8]

– David Silverman

Why are Precedent Studies Used?

Your community may choose to do a precedent study to help bring an idea to action. Precedent studies are a way to figure out the time, costs, and steps required to complete a project. They can also help you to communicate an idea to community members by finding a similar example.

You may find it valuable to learn from and study what has been done in other Indigenous communities. Precedents are a common tool in both planning and design to learn from other communities. Your community could choose to do a precedent study to research completed projects and guide a project.[4]

A precedent study cannot provide a formula that is guaranteed to work in any context. What worked for one community may not work for yours since there are many variables that contribute to the success of a project. Evaluate the information you gather to see the precedent's strengths and weaknesses. Think about differences between the precedent and your community's project. Instead of copying a precedent exactly, use it as a general guide for your community's project. The exact same process may not work for your community and may need to be adjusted to work in a different context.

How are Precedent Studies Used?

You can use a precedent study to guide your project. The lessons you learn from your precedent study help your project go faster and with fewer issues. Precedents are also good for finding ideas, thinking outside the box, and trying something different.[5]

For example, in the pre-planning phase, you could look at another First Nation's plan. Doing this could help you define your scope, set a realistic timeline, and find resources. In the planning phase, you might look at precedents for exciting community engagement activities or interesting ways to share your community vision. Finally, if one of your community's objectives is to build a new water treatment plant, you could use a precedent study in the implementation phase. You could research a community with the system you're looking to build and find out things like how much it cost, how much time it took to build, community satisfaction, and if there have been problems with it.

When are Precedent Studies Done?

Precedent studies can be done at any stage of a planning process to help a project move forward. They are usually completed at the beginning of the planning process to help make decisions about the project and figure out how long it will take.

How are Precedents Found?

You can find precedents in many ways, including the internet, newspapers or journals, or word of mouth. There is no right or wrong way to find precedents. However, differences between the communities may require changes to the process to reach a desired end result.

How are Precedent Studies Done?

A precedent study is a research project. You can find information on your precedent on the internet, in newspapers, magazines, journals, and books. You may also visit the project to learn more about it from being on site. You can talk to people who work there or who helped guide the project.[6]

It is important to choose a precedent that is similar to the one your community is exploring. It is also important to have access to lots of information about the project. The more information available, the better. Otherwise, it will be hard to learn from and find lessons to apply to your project. Knowing a lot about a project will make it a lot easier to apply similar concepts and approaches to the new project.

The content of a precedent study depends on the specific project. You may include pictures, a detailed description of the project, location, context, cost, support, timelines, market analysis/current value, community approval process, demographics, and why this precedent is important to the proposed project.[7]

The length of a precedent study is not important - it could be one page or ten. What matters is that it includes information needed to help your community make a decision on a project or provide ideas for a potential project. Creating one document that combines all of the information on a project can save time later.

You can use the following four steps when doing your study:

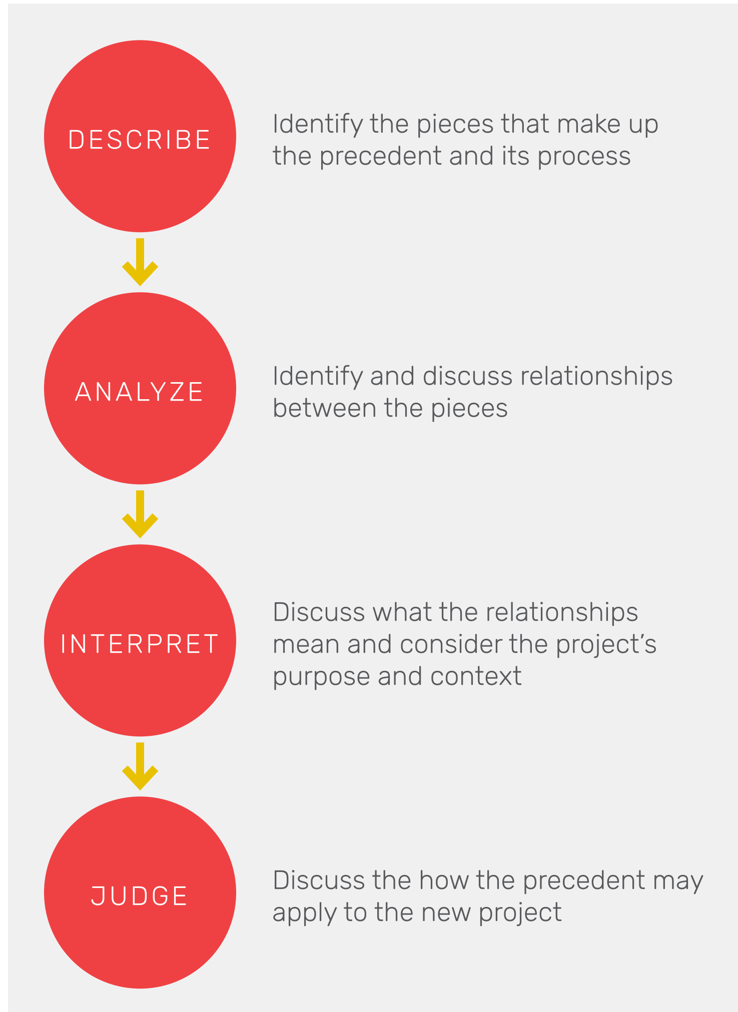

***Figure 1** | Steps in conducting a precedent study.*

Final Thoughts

Precedent studies are a great tool you can use in your planning process. They can help you learn about the successes and challenges of a project or process you're about to undertake. You can learn lessons from another community's experience to guide your own. Precedent studies can be used for your planning process, a new infrastructure project, or anything else you can think of. They often don't take a lot of technical expertise or cost a lot of money. Plus, a lot of information can be gathered online, with a phone call, or with a site visit, so they can be done by just about anyone.

Further Reading

Best Practices in Aboriginal Community Development: A Literature Review and Wise Practices Approach by Cynthia Wesley-Esquimaux and Brian Calliou

The article discusses how Best Practices can be used by an Indigenous community to learn from other Indigenous communities for their own development.

https://www.researchgate.net/publication/259176947_Best_Practices_in_Aboriginal_Community_Development_A_Literature_Review_and_Wise_Practices_Approach

Guidelines For Writing A Case Study Analysis by Ashford University

This resource lays out step-by-step instructions and structure for doing a precedent study.

https://awc.ashford.edu/tocw-guidelines-for-writing-a-case-study.html

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CONDUCTING FIELD DATA COLLECTION

by Alex Menjivar
Indigenous Planning Studio
April 2019

Summary

This fact sheet explains fundamental information on field data collection. It also outlines a process to plan and execute field data collection according to your project needs. Field data collection plays a role for collecting information that currently does not exist, and it provides evidence that can strengthen community knowledge of the land.

Keywords: collecting data, direction setting, building capacity, Elders/knowledge keepers, planning team

What Is Field Data Collection?

Conducting field work is a "hands on" way to understand and record the environment and land in and around the community. For some, it could be an enjoyable experience as it allows curious community members to be adventurous and reconnect with the land. Field data collection also provides the chance for community members to think about the environment and the reasons it has grown to be as it is.[1] You can use field data collection as a tool to collect background information on community resources. This helps the community understand the current situation. Collecting field data plays a role in filling in where information does not currently exist.[2]

Field data collection involves recording observations on how the environment is changing over time. The data you collect depends on what you are hoping to accomplish with your project, how you collect the field data, and what tools you use for data collection.

Field Data Collection Project Examples

Locating and mapping cabin locations in a community is an example of a field data collection project. This would require GPS units and maps to collect longitude and latitude.

Another example is a project to **measure coastline erosion on a lake** over time, which would require collecting data on the current coastline extent and comparing to past or future extents.

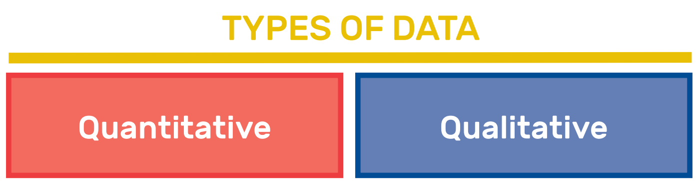

Figure 1 | Types of Field Data Observations

What are Quantitative Observations?

Quantitative observations include collecting measured values from the environment. An example is the location and number of observed fishing boats,[3] or the amount of snowfall at a particular location. Recording measurements allows for a direct comparison of observations over a short and long period of time and from multiple locations. For example, you could compare rainfall (in millimetres) in different part of the community over the duration of a storm.

What are Qualitative Observations?

Qualitative observations involve recording a detailed description of an object or phenomenon. An example is a description of the conditions of a cultural site or an interview with a hunter on the conditions of deer in the area.[4] Although it is not typically possible to compare qualitative observations the same way as quantitative observations, it is still possible to compare the descriptions of these observations (such as the experiences of various resource users).

Depending on your field data collection project, you could be collecting either one or both types of observations.

Why Is Field Data Collection Important?

The purpose of field data collection is to give community members another tool to understand and connect with the land and the environment. They usually know their land and environment best and are the first to notice changes, damage, and impacts of resource use. Having a documented record of environmental changes is extremely powerful evidence that helps prove impacts on the environment. This evidence could influence decision-making and efforts to preserve the environment or influence change.[5]

> *The purpose of field data collection is to give community members a tool to understand and connect with the land and the environment.*

How Is Field Data Used?

Quantitative and qualitative observations can both be used as evidence to show how the environment has changed. Field data is often used to add evidence to current knowledge and understanding of the natural environment.[6] Careful planning and execution of field data collection can also help communities add to their traditional knowledge.

Who Is Involved in Field Data Collection?

Field data can be collected by anyone who is interested in the project. However, it is often important to have a subject matter expert as well as a traditional knowledge keeper involved in the project. An example of this would be to have a botanist on a plant survey field data collection team to identify different plant species. A subject matter expert can help the data collection be more accurate, while a traditional knowledge keeper can help to ensure data collection is carried out in a way which respects community values and encorporates local knowledge.

How Is Field Data Collected?

There isn't a "cookie-cutter" way to collect field data. This is often determined by the project you wish to undertake, as well as opportunities, training, and personal experience.[7]

1) Understand the needs of your project

2) Create a data collection plan

3) Execute data collection plan

4) Compile and organize collected data and notes

5) Data analysis

Figure 2 | Data Collection Process

However, the following list provides a starting point to begin to understand your project's data collection needs (Figure 2).

1 Understand the Needs of Your Project

Understanding your project will help with identifying data collection needs. Asking questions about the overall goal and the data needed to support the goal will help determine what kind of data you are looking for, how to collect observations, and what tools you will need to collect your observations.

2 Create a Data Collection Plan

Creating a data collection plan will help to build a strategy for execution. Your plan could include when, where, how, who, and why you will collect data. Your plan could also identify what tools you will use to collect your data, what method you will use to record your data, and what safety measures should be in place.

3 Execute Data Collection Plan

Executing your data collection plan begins with safety. It is important that you go into the field prepared with the necessary gear. It is also helpful to inform another community member or leader of your activities so that they will keep track of you during your data collection. While in the field gathering data, it is important to assess the conditions (e.g. weather conditions, terrain) as you are in the field. It could be difficult to plan for unpredictable situations before going into the field. Re-adjusting your plan to collect field data is key to successful execution.[8]

4 Compile and Organize Collected Data and Notes

Once data collection is complete, organizing the observations and notes in a timely manner is very effective to document information while it is still fresh in your mind. Nuances in measurements or weather conditions during the data collection are all notes that should be recorded along with your collected data. This helps paint a clear picture of what the conditions were when data was being collected.

5 Data Analysis

Once the data has been collected and compiled, it can be analyzed to help contribute to your project. Whether it was to document the climate change experiences from Elders, or to map cabins throughout the community. The data collected will help you tell the story.

Final Thoughts

Understanding the importance of field data and the skills needed to plan and execute collection can help you gather the data needed to better understand your land and environment. Field data also provides the concrete and recoded evidence to support the perspective of the community for decision making and advocacy.

Further Reading

Analyzing Surveys by Lissie Rappaport

The Analyzing Surveys fact sheet provides a brief description on surveys and analyzing data.

Creating Surveys by Chantal Maclean

This fact sheet provides an introduction to creating surveys, its strengths and weaknesses, and how to approach consent and confidentiality with sensitivity.

Using Oral History by Natalie Lagassé

The Using Oral History fact sheet gives information on the using oral history as a tool for Indigenous communities as part of their history.

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DIGITALLY MAPPING INDIGENOUS KNOWLEDGE

by Ryan Fox
Indigenous Planning Studio
January 2020

Summary

This fact sheet shows how to collect and digitally store Indigenous Knowledge (such as important community, cultural, or environmental locations) on computers and through online mapping software.

Keywords: mapping, Elders/knowledge keepers, managing/storing data, collecting data, community engagement

What Is Digital Mapping?

Digital mapping is a way of collecting, storing, and presenting information within a computer or online mapping program. Digital mapping can be used to collect local Indigenous Knowledge. People can use it to collect lots of information without the need to use larger paper maps.

Some people may like to use large printed maps to collect information, but digitally collecting and storing information makes it easier for First Nations to keep copies of the information in multiple locations as well as quickly share it over the internet if needed. Digital mapping also makes it easier to edit the information afterwards, and because the information is easily shareable, working with others outside of the First Nation (like planners or government officials) becomes easier.

Why Is Mapping Indigenous Knowledge Important?

Many communities are in danger of losing Indigenous Knowledge. Rapid changes in the way of life of local communities and hundreds of years of colonization have caused younger generations to under-value or have difficulty learning Traditional Knowledge from Elders.[1] Documenting oral history and Traditional Knowledge from Elders for future generations is now an urgent priority for many First Nations.

For more information on mapping Traditional Knowledge, see the *Building a Community Atlas* fact sheet.

Mapping Indigenous Knowledge can also help First Nations defend the credibility of their land-use and claims to the land — within government or legal meetings.[2]

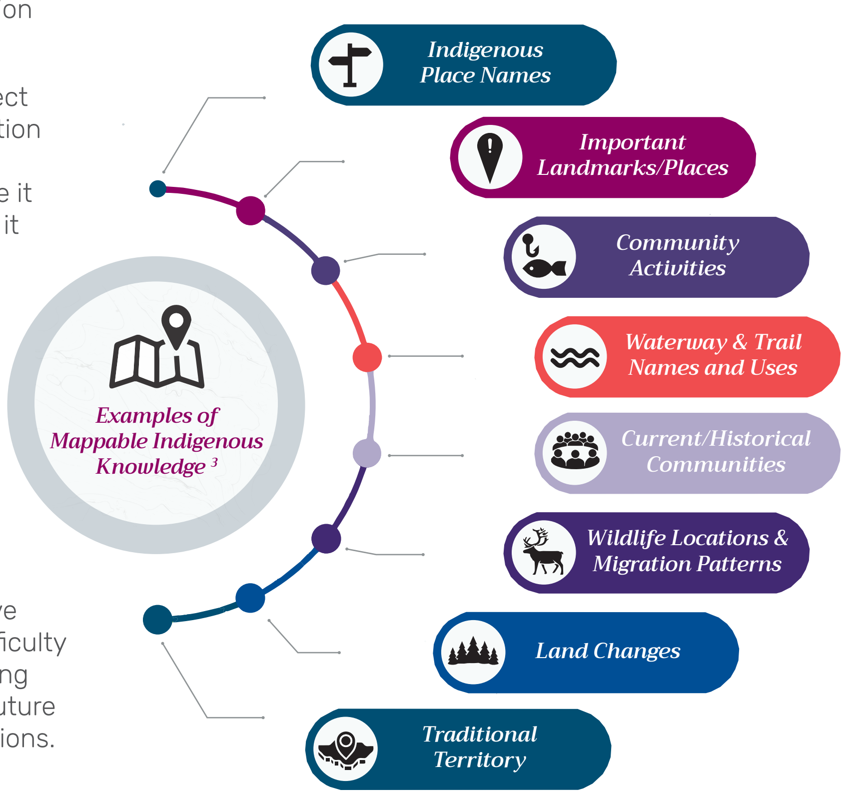

Figure 1* | *Examples of mappable Indigenous Knowledge.
Adapted from (Royal Canadian Geographical Society. *Indigenous Peoples Atlas of Canada = Atlas Des Peuples Autochtones Du Canada. First ed.*, (Royal Canadian Geographical Society), 2018; Icons from https://thenounproject.com)

What Is Digital Mapping?

You can use many types of mapping programs. ArcMap, QGIS, and Google Earth Pro are three popular mapping programs.

ArcMap and QGIS are professional mapping programs. They need strong computers to run smoothly, and both offer a large number of tools to create accurate and detailed mapping information. The main difference between the two programs is the cost and which computer systems they work on. ArcMap needs to be purchased and typically can only work on computers with a Windows system.[4] QGIS is free to use and works on both Windows and Mac systems (as well as others).[5]

Google Earth Pro can be easy to learn and is commonly used by mapping professionals and the general public. The program is also free, works on limited internet connections, and can be used on many types of computers. The program can use and display ArcMap or QGIS files by simply dragging the file onto the map.

Because Google Earth Pro contains less tools than ArcMap or QGIS, the information created on it may not be as accurate or detailed as the other two programs. Google Earth Pro also creates different file types (KML/KMZ) with less information.[6] If you choose to use Google Earth, you'll likely be using the 'Pin' and 'Polygon' tool the most. Once information is added, the created layers in the program can be saved by clicking on the layer folder on the left side of the page and selecting 'Save As'.

For smaller communities or communities with limited internet connectivity, using Google Earth Pro may be the best option for mapping Indigenous Knowledge.

For more information on how to use Google Earth Pro, please see the 'FURTHER READING' section at the end of this Fact Sheet.

How Do You Prepare for and Perform Mapping Interviews?

Ideal Location for the Interview

The interview location should be accessible to the participants. The ideal location for having a digital mapping interview session would be in a private room with a table and some source of internet connection. A table is needed for equipment, beverages, and additional paper documents. Quiet and private locations are good if the interviews are being recorded or if the information from the participants is confidential. If using a projector, try to get a darker room with a clear white wall or screen to project the map onto.[7]

For more information, see the *Creating a Communication Plan* and *Selecting TLE Lands* fact sheets.

EQUIPMENT, DOCUMENTS, AND SUPPLIES TO CONSIDER BRINGING FOR MAPPING INTERVIEWS

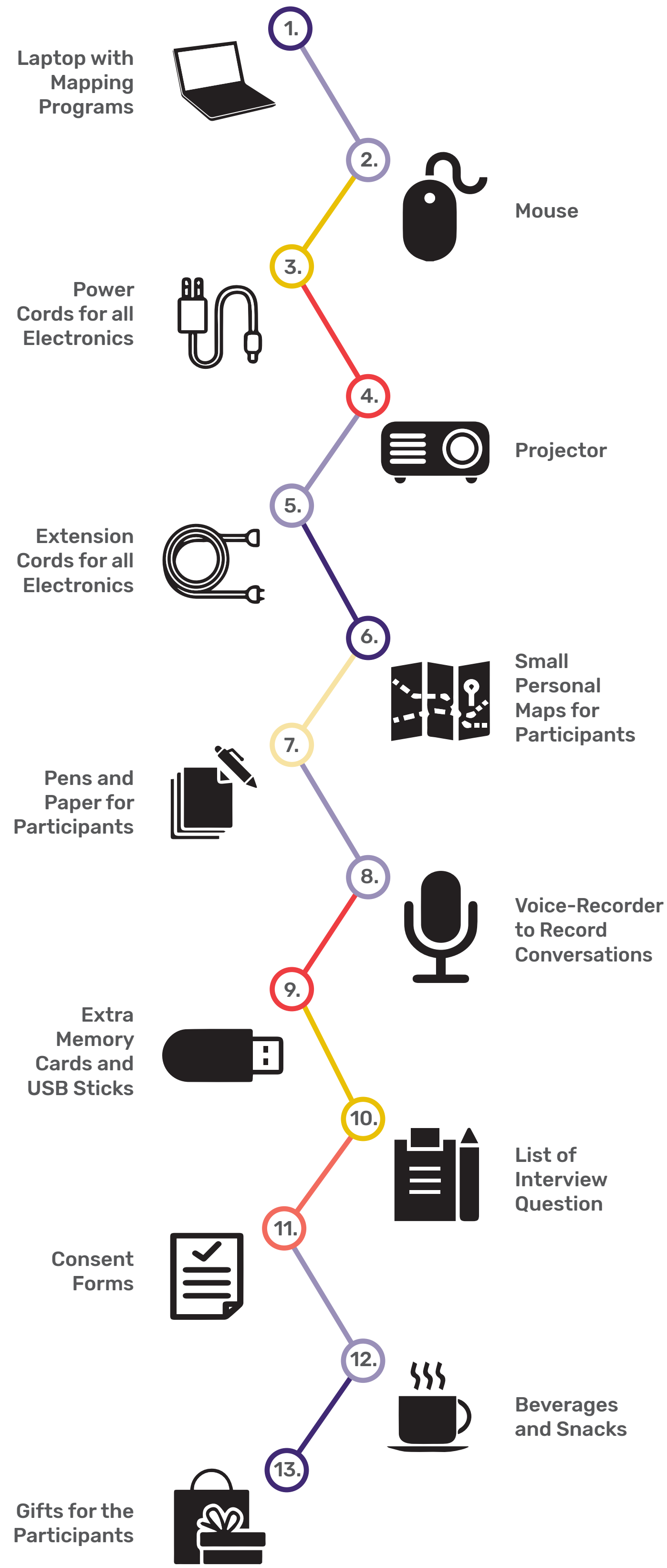

Figure 2 | What to bring to mapping interviews.
Source (Icons from https://thenounproject.com)

People Involved in the Interview

If possible, it is good to have around two people collecting information, one community liaison, and up to four interview participants at a time. A community liaison would be somebody familiar with the community and the surrounding area, as well as someone the community trusts. If there are more than four interview participants, it may not allow each participant to fully participate in the interview.[8]

Performing Mapping Interviews

Mapping interviews can take up to one to three hours. If the interview is longer than an hour, try to take a break at some point to avoid overwhelming the participants.[9] Try to make the interviews feel casual, this can help the participants feel comfortable. Also, try to be flexible with interview times and how the interview questions are asked. Before starting, try to let the participants know about the project, what will happen during the interview, and what the jobs of the people in the room are.

Try to work on one clear mapping target at a time within the interview so it doesn't become confusing to the participants. Also try to make sure all of the interviews follow the same methods and procedures.[10]

If some information feels confidential, always err on the side of caution.[11] Difficult or unpleasant interviews can scare away future participants, so try to make them comfortable and friendly. When finished, if possible try to let the participants know about the next steps with the project and ask for their help to check the spelling of location names.

What Are Possible Interview and Mapping Challenges?

Sometimes you won't get mappable information during the interviews. Just make a note if someone participated in the interview but didn't give any mappable information.[12]

Sometimes information is given too quickly. Try to wait for the right moment to have them share the information again.

When collecting data, try to mark locations with points rather than circling or marking the location boundaries. In some situations, mapping the boundaries of an Indigenous location may create unnecessary limitations on the area because it can restrict the importance of the location within and around the marked boundary.[13]

Sometimes participants will not be familiar with how your map works, so be prepared for these challenges and leave time to share your knowledge about the mapping process with participants.[14]

Final Thoughts

Collecting and digitally storing Indigenous Knowledge can help preserve large amounts of traditional and cultural Indigenous Knowledge from Elders and community. Learning how to collect and map the knowledge helps educate youth and may also help defend the credibility of future land claims.

Further Reading

Building a Community Atlas by Bradley Muller

This fact sheet outlines the typical purpose, process, and management of community atlas'.

Creating a Communication Plan by Isaac Laapah

This fact sheet discusses what an engagement and communication plan is, its components, how to structure it and how to measure the success of the plan.

Selecting TLE Lands by Justin Loma

The fact sheet explains the five stages of selection for implementing Treaty Land Entitlement. This includes land use mapping skills; land selection; and accessing and finding the desired land.

ArcMap and ArcGIS

A pay-to-use mapping program for Windows computers.

To download or for more information, please visit https://www.esri.com/en-us/arcgis/about-arcgis/overview.

(Continued on Page 4)

Further Reading (continued)

QGIS

A free mapping program. Can be downloaded on Windows, macOS, Linux and Android computers.

To download or for more information, please visit https://qgis.org/en/site/.

Google Earth

You can download Google Earth Pro using the link below. Within the website, it will give three download options. Please select the "Download Google Earth Pro on Desktop" option and follow their instructions to install the program.

https://www.google.com/earth/versions/

Google Earth Pro: A Tutorial by the University of Waterloo

Provides more information on how to use Google Earth Pro.

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PLANNING FOR EMERGENCIES

by Santan Singh
Indigenous Planning Studio
January 2020

Summary

This fact sheet discusses how your community can incorporate emergency planning into the planning process. Emergency planning is crucial because it prepares and helps the community in responding to any emergency that may occur. This fact sheet also discusses roles and responsibilities of governments that can help communities during an emergency.

Keywords: managing the process, direction-setting, building capacity

What Is Emergency Planning?

Emergency planning is done to prepare and respond to emergencies, including natural disasters, pandemics, cyber incidents, terrorism, fires and any other emergencies that may affect the whole community.[1] Some First Nations are more vulnerable to experiencing regular floods and fires due to geographic location and socio-economic factors so it is essential to understand emergency management to prepare and mitigate effects during an emergency.[2] It can often also be more challenging to deal with emergencies in First Nations compared to other jurisdictions because of these factors. An effective emergency response system is essential for all First Nations to minimize loss of life and resources.

In Canada, an emergency management framework is subject to the requirements under the Emergency Management Act, 2007. Preparing for emergencies is a combined effort of all levels of government. Together, Ministers of federal, provincial, and territorial governments prepared a framework and guidelines published by the Public Safety Department under the act to deal with emergencies in any community in Canada.[3]

Why Is Emergency Planning Important?

No community is free from the risk of natural or human-induced disasters. Emergencies such as forest fires, floods and earthquakes occur every year in many communities across Canada. When such events happen, the response taken at the early stage of a disaster is essential. A state of panic is the most common reaction to any disaster, and effective emergency planning can help the community handle the situation effectively by providing the step-by-step instruction needed to carry out an effective response. Emergency planning ensures that effects on the health and safety of community members are minimized and prepares the communities to optimally utilize the resources available during the emergency.[4] Emergency planning is a step-by-step process and takes place in stages, considering before, during and after-effects of the disaster.

How Is Emergency Planning Done?

Federal, provincial and territorial (FPT) governments have a responsibility for emergency management and public safety across Canada, including on First Nations lands.[5] Public Safety Canada has implemented the "all-hazard approach" to develop Strategic Emergency Management Plans (SEMPs) specific to communities. The SEMP approach is broken down into four components applicable to all emergency plans across Canada. The components are as follows:

1 Prevention and Mitigation

The first component of any emergency plan is prevention and mitigation, which means things that can be done to reduce the risk before the incident occurs. For example: conducting specific risk assessments on critical infrastructure can help prevent failure of infrastructure systems during a disaster. A community can also develop education and training programs specific to the community which can prepare staff and community members for what to do if a disaster occurs.

2 Preparedness

The second component is preparedness. Preparedness for an emergency includes conducting mock drills, training sessions, educating the community based on past experiences, and learning from other communvities. Community-specific programs can be arranged by adminstration to make sure that there are response plans in place specific to each possible emergency[6]. Emergency preparedness is a never-ending process and should include periodic reviews and regular testing. Preparedness helps administration avoid panic in the community and produce an adequate response during and after the disaster occurs.

3 Response

The third component is a response, which is initiated after the emergency has occurred. The response should include practical strategies informed by the prevention and mitigation, and preparedness policies and experiences. Response strategies include defining roles and responsibilities of governments, post-incident analysis, and regular updates to the emergency management plan. The goal is to protect human life, infrastructure and community assets. An effective response also involves the assessment of immediate damage and seeking financial and social support as needed. The response teams are trained beforehand to deal with the situation in the most effective way.[7]

4 Recovery

The last component of emergency management is recovery. Recovery involves the restoration of activities and operations back to normal as soon as possible. First Nations may need to get in contact with federal and provincial governments for financial support if needed. A community may also want to mobolize its members as volunteers to assist. Depending on the type of disaster, community members may be dealing with the effects of trauma. Federal guidelines state that authorities must provide counselling for those in need. After the recovery, authorities and communities should work together in putting together a 'lessons learned' document to inform responses to future disasters.[8]

These four components cover both natural and human-induced hazards and disasters. By following these components, First Nations can develop SEMP for their community and manage disasters more effectively.

How Do You Develop a SEMP for your Community?

The Strategic Emergency Management Plan developed by the federal government has five stages.

1 Initiate

The first step involves identifying and selecting the planning team based on skills and experience. The team can be inter-departmental. This step involves establishing accountability and clearly defining the roles and responsibilities of the planning team members. Once the team is selected, a review of relevant existing legislation and policies is conducted. The team should also review existing emergency plans (if they exist) and identify the issues that need to be revised or updated. The last task of this stage is to develop a work plan which consists of realistic timelines, milestones, and assigned tasks. The team can also develop an initial budget to be used for later stages.[9]

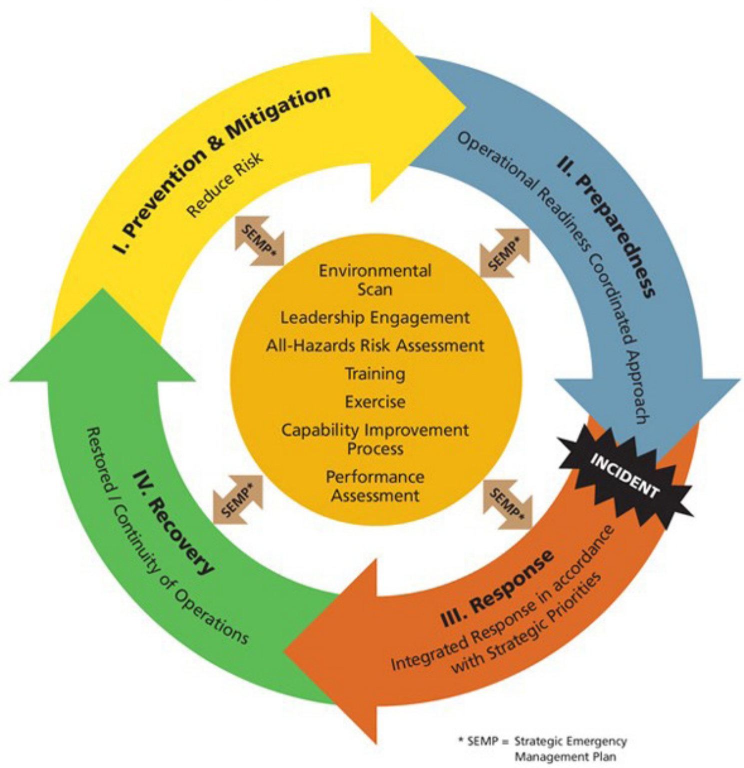

***Figure 1** | Emergency Management Continuum.*
Source (Public Safety Canada. "Emergency Management Planning Guide 2010-2012." Ottawa: Public Safety Canada, 2010. Accessed December 1, 2019. https://www.publicsafety.gc.ca/cnt/rsrcs/pblctns/mrgnc-mngmnt-pnnng/mrgnc-mngmnt-pnnng-eng.pdf.)

2 Orientate

This stage starts with an environmental scan which includes research about technology, economy, policies, demography and organizations. A SWOT (strengths, weaknesses, opportunities, threats) analysis can also be conducted. Through this background research, vulnerabilities to assets and areas within the community are identified. Vulnerabilities could include outdated emergency plans, insufficient support and lack of training. The last task of this stage is to identify, analyze and evaluate risks by conducting an all-hazard risk assessment.

For more information, see the *Conducting a SWOT Analysis* fact sheet.

Risk assessments consider natural hazards, intentional, and unintentional human actions. The analysis of a risk assessment includes understanding past studies and the impacts of the risk for all kinds of emergencies. The evaluation of a risk will help you categorize the risk into low, moderate or high-risk priority levels. By the end of this stage, the emergency plan has identified and evaluated the risks which the community is most likely to face.[10]

3 Develop SEMP Building Blocks

This stage involves establishing an emergency management governance and establishing a senior management team, communication plan, legal services, and security. In this step, limitations and constraints are identified and the emergency management continuum discussed above is applied to identified risks. The outputs of this stage are specific plans that support SEMP and planning considerations that can be used in the implementation.[11]

4 Write the SEMP and Seek Approval

This stage involves writing a draft SEMP which should include risk assessment, roles and responsibilities, support and resource requirements, timelines, updated procedures and a list of key people who will carry out implementation. The plan goes for approval to senior management and after approval can move towards the implementation stage.

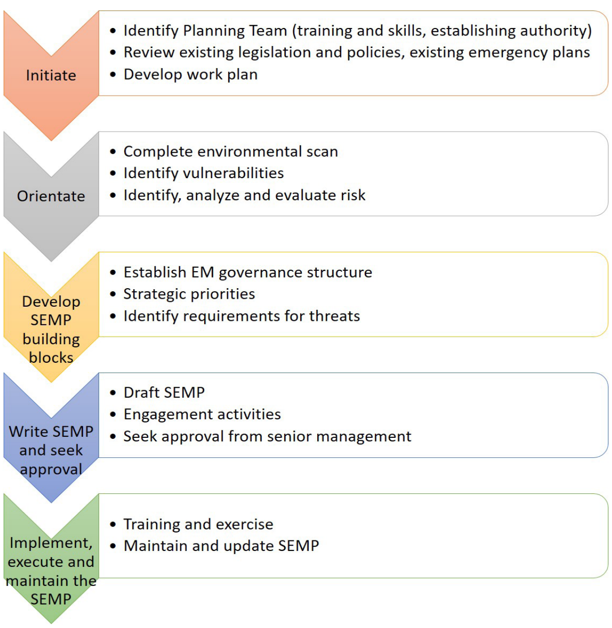

Figure 2 **|** *Steps to develop a SEMP .*
Source (Public Safety Canada. "Emergency Management Planning Guide 2010-2012." Ottawa: Public Safety Canada, 2010. Accessed December 1, 2019. https://www.publicsafety.gc.ca/cnt/rsrcs/pblctns/mrgnc-mngmnt-pnnng/mrgnc-mngmnt-pnnng-eng.pdf.)

5 Implement, Execute and Maintain the SEMP

To implement the approved SEMP, the plan should be distributed to Chief and Council, band adminstration, and other people who have key roles and responsibilities defined earlier in the plan. The SEMP is an important resource and should be reviewed every two years.[12]

Who Can Help Your Community during an Emergency?

Different organizations have specific roles and responsibilities during an emergency. According to the framework by the federal government, the following organizations have a responsibility when a community experiences an emergency.

1 First Nation Governments

First Nation governments have a crucial role since they are responsible for the immediate response to an emergency. Public Safety Canada states that it is the responsibility of First Nation governments to keep their emergency plans revised and clear. First Nations governments can use local resources to handle the situation, and if the situation gets out of control, it is their responsibility to request funds from provincial or federal governments.

First Nations governments can also provide social supports including mental health, spiritual, and cultural supports to the community. First Nations governments are encouraged to incorporate Indigenous Knowledge in emergency planning if they choose.[13] This can be carried out during any phase of the process.

2 Federal Government

The federal government helps to identify the risks to communities and public infrastructure. Public Safety Canada is responsible for making communities aware of all emergency plans developed by the federal government in all jurisdictions across Canada, including First Nations.[14] The federal government also provides economic assistance to any community in need.

3 Indigenous Services Canada (ISC)

The federal government provides financial assistance to First Nations through ISC's Emergency Management Assistance Program (EMAP). For example, during the 2011-12 Manitoba flood, EMAP assisted 27 First Nation communities with flood mitigation efforts, and helped evacuate 12 communities.[15] The majority of funds go toward fixing infrastructure lost during a disaster. ISC follows the all-hazard approach and components defined in this factsheet. ISC also helps First Nations governments review and keep their SEMPs up to date.

4 Provincial and Territorial Governments

During an emergency, there may be a loss of housing and food sources, so provincial and territorial governments provide shelter and food to the affected people. ISC helps First Nations to decide what kinds of services the provincial government will offer during an emergency.[16] Some provincial governments provide reimbursements to First Nations after disasters.

5 Health Canada

During an emergency, a health crisis can occur. Many communities are isolated, and transportation can be cut off during a flood. Health Canada can play an essential role in these situation. They provide support and health care services to affected communities. They can alsowork with First Nations governments to create response plans for potential health-related emergencies.

Final Thoughts

Emergency planning is an essential consideration in the planning process. The strategic emergency plan should be clear and reflect local knowledge, official policies, and technical expertise. Effective implementation of the four components of the emergency management continuum and the all-hazard approach has been proven effective for many First Nations across Canada and should continue to be the basis of any emergency plan in the future. The emergency planning documents should be revised regularly. All levels of government need to work together for effective planning.

Further Reading

Emergency Preparedness and First Nation Communities in Manitoba by Donna Epp

This book provides insights into the experiences of three First Nation communities (Mathis Colomb Cree Nation (Pukatawagan, Manitoba), Roseau River Anishinabe First Nation and Sioux Valley First Nation) in Manitoba who have experienced emergencies. Lessons Learned may be informative for other communities.

Canadian Red Cross

The Red Cross supports Indigenous Peoples across Canada with education and training to deal with disasters. They also provide support to families before, during and after an emergency. They provide information on some of the response carried out by First Nations who have experienced disasters.

https://www.redcross.ca/how-we-help/emergencies-and-disasters-in-canada/be-ready-emergency-preparedness-and-recovery/emergency-preparedness-for-indigenous-communities

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16. Collier, 2015

ADDRESSING CLIMATE CHANGE

by Andrew Treger
Indigenous Planning Studio
April 2019

Summary

This fact sheet explains how climate change relates to Indigenous community planning. The United Nations acknowleges that "climate change is the defining issue of our time".[1] As Indigenous communities can be particularly vulnerable to the effects of climate change they are uniquely positioned to manage and plan for it.

Keywords: planning, collecting data, reporting back, Elders / knowledge keepers, direction setting

What Is Climate Change?

Commonly thought of as the biggest environmental challenge humanity has ever faced, climate change refers to a change in global or regional climate patterns over time. While weather can change in just a few hours, climate usually takes tens of thousands of years to change.[2] There is a high level of agreement in both international scientific communities and governments, that global climate conditions are changing.[3] Indicators of climate change include rising global temperatures, warmer air temperatures, melting sea ice, sea level rise, and ecosystem loss. In Canada, impacts will likely include increased flooding, drought, intense summer heat, violent storms, and other extreme weather. Figure 3 on the following page shows warmer and cooler seasonal and annual temperatures compared to the 20th-century average.

Figure 1 | Melting Glacier
Source: (Stanley, David. "Melchoir Glaciers." Digital image. Flickr. November 3, 14. Accessed January 23, 2019. https://www.flickr.com)

> "Weather records from across Canada show that every year since 1998-that's 20 years ago now-has been warmer than the 20th century average. This means that a whole generation of Canadians has never experienced what most of modern history considered a 'normal' Canadian climate."[4]
>
> - The Climate Atlas of Canada

The Earth's climate is affected by a number of natural features which include Earth's tilt, its orbit, changing ocean currents, and atmospheric make-up. We also know that they do not explain the recent climatic changes seen around the world. Evidence has led scientists to understand that these changes are directly linked to human activity – notably the addition of greenhouse gases (GHG's) such as carbon dioxide, to our atmosphere.[5]

The more we learn about climate change and the environment, the more we realize what we don't know. At the local level, it is crucial to understand both how communities may be affected by climate change and what strategies they can use to adapt or build resilience to its effects. This will help protect communities and enhance the lives of their residents.

How Does Climate Change Impact Indigenous Communities?

While everyone on Earth will be affected by climate change, it is expected that Indigenous communities may be uniquely impacted[6,7]. Indigenous communities preserve a close connection with the land and work with natural resources, locations, and economic structures. This makes Indigenous communities more vulnerable to facing greater challenges as the climate changes. Many also rely on the environment for medicines and other cultural practices. The environment plays a critical role in these communities and one that is threatened if current climate trends continue.

While the impacts of climate change are different for each community, some potential effects are listed in Figure 2 below.

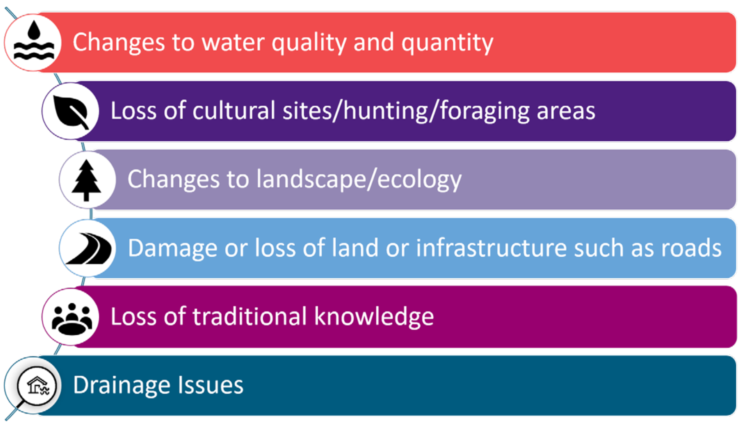


Figure 2 | Potential Effects of Climate Change on Indigenous Communities.

As Figure 2 shows, not only does climate change pose a threat to the economies of these communities, it also threatens the culture and well-being of their residents. Someone who is on the land might notice changes in animal migration patterns, or that plants and trees are growing differently. The key is that these local changes are linked to a bigger pattern of global change.

Although more research is needed to understand the impacts of climate change in Indigenous communities, it quickly becomes clear that if these impacts are going to be avoided in the future, we have to act now.

Whose Responsibility Is It?

Climate change is a global problem that will require international attention and action if its effects are to be reduced and managed. Canadian municipal, provincial, and federal governments are currently trying to address climate change on a number of levels', however, progress has been slow. But climate change can also be addressed at the local or individual level. It is up to every person and community to decide for themselves what their responsibility is in addressing climate change.

Although Indigenous communities may often contribute the least to climate change, they are some of the first to see to its effects. In this way, Indigenous communities are uniquely positioned to manage and plan for it.

> *Although Indigenous communities may often contribute the least to climate change, they are often some of the most vulnerable and first to see to its effects. In this way, Indigenous communities are uniquely positioned to manage and plan for it.*

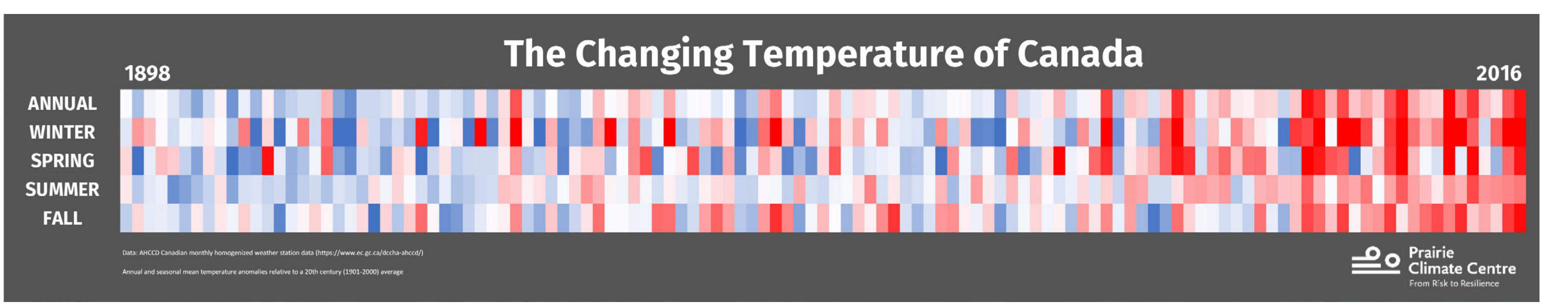
How Can the Issue of Climate Change Be Made a Part of the Planning Process?

Generally, planning is a multi-step process meant to help take you from where you are to where you want to be. In this way, climate change can and should be made a part of a community planning process as all communities will have to deal with the effects of climate change sooner or later.

Although different frameworks could be used to address climate change in a community, a series of guidebooks provided by the Centre for Indigenous Environmental Resources (CIER) (in partnership with various other agencies), outline one potential process which is highlighted below:[8]

1. Select a project team or working group to look at the issue.[9] As communities can have a range of contexts and resources, it is important to select a team that

Figure 3 | Changes in the Observed Mean Temperature Data in Canada.
Source: (Prairie Climate Centre. "The Chaging Temerature of Canada" Digital image. Prairie Climate Centre. October 31, 2017. Janurary 26, 2019. http://prairieclimatecentre.ca/2017/10/seeing-is-believing-historical-records-prove-canada-is-warming/.)



understands the community and who can communicate and work well with other community members. The working group should have a general understanding of climate change as well as a sense of how it fits into the general priorities and vision for your community as a whole.

2. Have the working group look at the specific impacts on your community.[10] Impacts can range in terms of scale and severity. This step could involve speaking with elders or brainstorming with other community members about where they have seen evidence of climate change.

3. Have the working group get a better sense of both the vulnerabilities of your community and any factors that influence these vulnerabilities.[11] Ask questions like, "Is flooding an issue in your community? And if so, where is flooding the worst?" This can help you begin to identify strategies that reduce risk and improve sustainability and resiliency in community planning.

4. Identify solutions that could be put in place at the community level.[12] This may the most difficult step as climate change is a complex issue and a community can only do so much on their own. Solutions could include identifying areas for a firebreak or drainage swale. In other words, things that are realistic and also impactful. Searching for funding for the fifth stage could also take place in this step,

5. Implement and take action.[13] Taking "action" could include a variety of activities that were identified in the previous step. This could include working or creating a project, policy, or initiative that you have found would benefit the community's climate change resiliency.

6. Monitor progress and change over time.[14] Gathering this data is very important as it will be useful for tracking your success and help future community members continue to address climate change.

A diagram outlining this framework is shown in Figure 4. Each of these steps belongs to a larger overall process and take time, repeated consultation, and strong decision making. In many cases, it might be useful for the community or working group to make an action plan to help in implementation of effective change.

How Do You Begin?

Many Indigenous and northern communities have begun monitoring and addressing climate change. Action plans utilize traditional knowledge to help implement goals the community has identified.

For more information,
see the *Creating Action Plans* fact sheet.

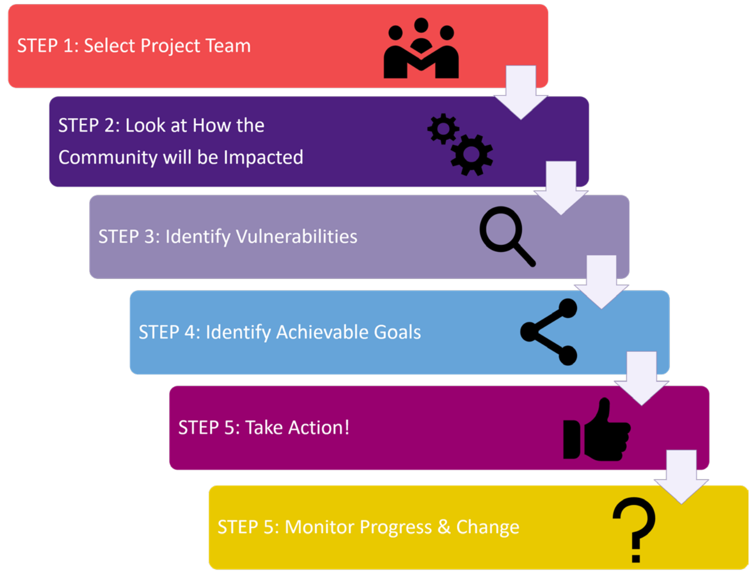


Figure 4 | Potential Planning Process for Indigenous Communities
Adapted from Centre for Indigenous Environmental Resources. (2006). Climate Change Planning Tools for First Nations Guidebooks. Retrieved from Centre for Indigenous Environmental Resources: http://www.yourcier.org/climate-change-planning-tools-for-first-nations-guidebooks-2006.html

The scope of this work has ranged from joining advocacy initiatives to building partnerships to the creation of community action and land use management plans. Building resilience and sustainability in a community along with adopting strategies that fit the community is key to success. Consultation and knowledge building go hand in hand in this process and are likely needed to reach long-term goals.

Although every community has limitations in terms of available funding and people power, there are some climate change supports that communities can access.

Examples of programs and/or initiatives have included:

- The First Nation Adapt Program
- Indigenous Community-Based Climate Monitoring Program
- Climate Change and Health Adaptation Program
- Northern Responsible Energy Approach for Community Heat and Electricity Program
- Climate Change Preparedness in the North Program
- Indigenous Climate Action
- Center for Indigenous Environmental Resources

These supports range in function and level of support. Some provide direct funding while others offer research and information.

If you are interested in knowing more about the effects of climate change in your area, your local community office may either have some resources that can help you or may be able to put you in touch with someone who does. The Praire Climate Center, Environment and Climate Change Canada, and Manitoba Sustainable Development are other resources.

Final Thoughts

Climate change is the most serious environmental challenge we have ever faced. Indigenous communities can plan for resilience as a community with the help of traditional knowledge, partnerships, and planning.

Further Reading

Climate Change Planning Tools for First Nations Guidebooks by the Center for Indigenous Environmental Resources

These guidebooks work together to form a cohesive tool-kit for climate change planning in First Nations communities. They outline a step-by-step process for addressing climate change issues and provide examples of workshops and community activities that can be used to engage with communities.

http://www.yourcier.org/climate-change-planning-tools-for-first-nations-guidebooks-2006.html

Climate Atlas of Canada by Prairie Climate Center

The Climate Atlas of Canada is an interactive tool for citizens, researchers, businesses, and communities to learn about climate change in Canada. The Climate Atlas shows a variety of information such as changes in rain, air temperatures, humidity, growing season, and frost days over time with estimates in the immediate and near future.

https://climateatlas.ca/

Endnotes

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CELEBRATING SUCCESS

by Cheryl Mann
Indigenous Planning Studio
April 2019

Summary

This fact sheet explains how celebrating success is an important part of Indigenous community planning. Celebrating success helps you reflect on how far you have come, enjoy the present and build excitement for the future.

Keywords: community engagement, communication tools, reporting back, managing the process, planning team

What Is Celebrating Success?

Setting goals is a familiar step in comprehensive community planning. You brainstorm to come up with them and work hard to reach them. But what is the next step when your goals are met? Celebrate! Celebrating success means recognizing you have reached a goal and acknowledging it by doing something that makes you and others happy. Successes and their celebrations can range from small to big, and can be different for every person. Most of us already know how to identify and celebrate success.[1] We give medals for first place and plan parties for high school graduations. Celebrations might be less familiar in the context of comprehensive community planning, but they are no less important.[2]

For more information on setting goals, see the *Setting Goals and Objectives* fact sheet.

Why Celebrate Success?

Creating a comprehensive community plan is a big job that can take years to finish. Over time it is easy to lose interest, forget your original goals and feel like you are not moving forward. The challenges are large and make it easy to forget about the many things you have completed. The day-to-day work behind the project may be challenging. The community can feel like they are not being included. With the finish line so far away, doubt can creep in, leaving people wondering if the plan will ever be done.[3]

Celebrating success is an excellent way to stay on track, keep people interested and see how far you have come.[4] Instead of worrying about how much work is left, it reminds you to pause and enjoy your successes. Celebration helps your planning team stay motivated and gives them the confidence to keep going, knowing that their past efforts are valued. Whether you are a team leader or a team member, taking the time to celebrate success can make a big impact. It is a positive boost, making your planning team feel good about their hard work and inspired to continue.[5]

Figure 1 **|** *Celebrating success is an important part of the planning process, helping to keep people feeling positive and motivated.*
Source (LoraxGirl. "CELEBRATE!" Digital image. Flickr. July 12, 2014. Accessed January 29, 2019. https://www.flickr.com/) CC BY-NC 2.0.

Celebrating success is also a great way to engage with your community. You can share your progress, get feedback about your work and excite people about the future of the plan.[6] It lets everyone know where you are in the planning process and makes sure they feel involved, from beginning to end. This creates a transparent planning process and builds trust, so people are more willing to be a part of the process.[7]

For more information on transparency, see the *Promoting Transparency and Accountability* fact sheet.

Celebrating with the community is also a chance to interact with people who might not normally take part in the planning process.[8] Going to a formal meeting or filling out a survey might not attract a big crowd, but who would not want to attend a fun event like a community feast? Take the time to get feedback from people who have not yet been a part of the planning process and encourage them to join your events in the future. Everyone in the community should have the chance to contribute to the plan.[9]

When to Celebrate Success?

There is no right or wrong time to celebrate. You need to find what works best to keep your planning process motivated. Remember that no success is too small and you can never celebrate too often – happy people do better work![10] It is just a matter of having the right type of celebration for the type of success. While some successes are easy to recognize and celebrate, there are many times when we miss the chance. To help know when to celebrate success, it is useful to think of small, medium and large successes.

Small Successes

It can be hard to know when to celebrate a small success. They happen on a daily basis and we often do not even notice them, thinking they are just "part of the job". But it is the little everyday tasks that slowly add up to big results. No large success would be possible without the many small successes you achieve every day![11]

> *"There is no right or wrong time to celebrate, you need to find what works best to keep your planning process motivated."*

A small success could be finishing a poster or having people attend your meeting. A poster might be a quick project, but it can have a big impact when your message reaches the entire community. Meeting attendance might be partly out of your control, so it is extra exciting when people make the choice to attend.[12] Celebrating these small successes helps your planning team get excited about their work and see how their everyday efforts add to the final result.

SMART Goals

Consider setting daily SMART goals to help you recognize your small successes. You may already be familiar with this type of goal:

SPECIFIC → **S**MALL

MEASURABLE

ATTAINABLE

REALISTIC

TIMELY

By changing specific to small, you can set goals that can be reached within a day, becoming a small success to be celebrated.[1]

Medium Successes

Medium successes are easier to recognize. They may have taken weeks or even months to finish and probably more then one person worked on them. There may have been many small successes that led to a medium success being reached, but that should not take away from celebrating the medium success. Finishing a quarterly report could be a medium success. It took many people and small success to complete and is a great way to see how far you have come.

Large Successes

It is easiest to know when a large success has been reached. It is a major milestone, a big goal that many people have worked towards for a long time – maybe even years! You feel proud of your hard work and want to congratulate the people who helped get you there. Do not let that feeling pass! Celebrate your large success and let those good feelings carry you through the next phase of the planning process.

Who to Celebrate Success with?

Who to celebrate with depends on the success – small or medium or large – and who you want to celebrate with. Small successes are often projects that your planning team can celebrate internally. A finished poster could be celebrated by just the team leader and team member, while a completed presentation could be celebrated by the entire planning team.[14] Medium successes can be celebrated by just the planning team, but could also include other key people who helped make the success possible. This could be community leaders or individuals who went out of their way to help the planning process. Large successes should be celebrated by the entire community.[15] It is a time for everyone who worked on the plan, contributed to the plan and will be impacted by the plan to gather and recognize the progress that has been made.

How Do You Celebrate Success?

Celebrations can range from small to large, matching the size of the success they are for. A handshake, round of applause or personal note could all be used to celebrate a small success. A poster, cookies or a website update could be used to celebrate a medium success.[16] Annual events, like community feasts or a tipi raising could be used to celebrate large successes.[17] What is most important is finding a type of celebration that is enjoyable and motivating for your planning team and community. It is a time to gather and recognize the progress that you have made.

Final Thoughts

Celebrating success is an important step in the planning process. Celebrating successes regularly creates an excited planning team and engaged community that are eager to work together to create a brighter future for your community.

Further Reading

CCP Handbook: Comprehensive Community Planning in British Columbia by Indigenous and Northern Affairs Canada

https://www.aadnc-aandc.gc.ca/DAM/DAM-INTER-BC/STAGING/texte-text/ccphb2013_1378922610124_eng.pdf

Moving Towards a Stronger Future: An Aboriginal Resource Guide for Community Development by Little Black Bear & Associates

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

These books both provide suggestions on when and how to celebrate your community's planning successes.

Endnotes

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Squiala First Nation, 2013.
7 Gallagher, 2008, p. 37.
INAC, 2016, p. 62.
8 Wates, Nick, ed. The Community Planning Handbook: How people can shape their cities, towns and villages in any part of the world. (London: Earthscan, 2000), p. 30.
9 INAC, 2016, p. 2.
10 Squiala First Nation, 2013.
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12 Little Black Bear & Associates, 2011, p.78-79.
13 Little Black Bear & Associates, 2011, p.79.
14 Little Black Bear & Associates, 2011, p.79.
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17 INAC, 2016, p. 62.

CREATING ACTION PLANS

by Evan Sinclair
Indigenous Planning Studio
April 2018

Summary

This fact sheet discusses how an action plan can help your community achieve its goals. It also explains who is involved in the action planning process, how the action plan is used, what resources are required, and what some of the common challenges are. Finally, this resource offers some helpful tips for guiding a successful action planning process. Importantly, it describes how to keep community members interested and involved while making the plan!

Keywords: communication tools, managing the process, direction setting, planning team

When is an Action Plan Created?

The process of creating a Community Plan is commonly broken into four phases, as shown below in Figure 1:

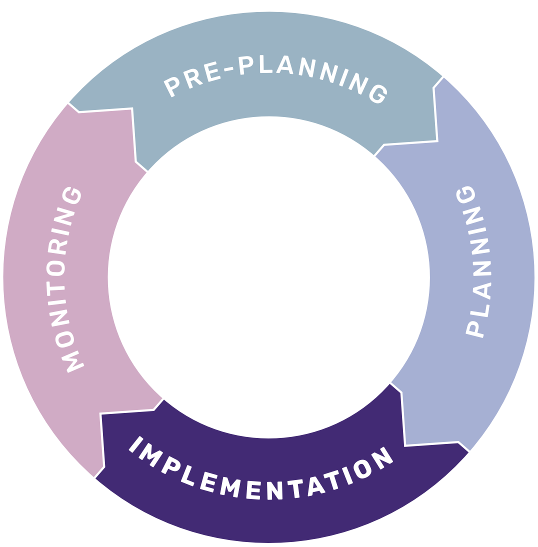


Figure 1 | *The Four Phases of Creating a Community Plan.*
Adapted from (Aboriginal Affairs and Northern Development Canada / Indigenous Services Canada. CCP Handbook – Comprehensive Community Planning for First Nations in British Columbia. 2016. http://www.aadnc-aandc.gc.ca/eng/1100100021966/1100100021970. p. 14.) *Used with permission.*

Action plans are generally created when your community is in the implementation phase of the process.[1] This means you will have already completed your Community Plan! While implementation is generally defined as the third phase, the beginning and end of each phase is not always strict.

It is important that you adapt the process to suit your community's needs. In some cases, projects that do not require a great deal of resources can be implemented sooner than others.[2] Still, before you start the action planning process, you will need to set your community's goals and objectives.

For more information, see *Setting Goals and Objectives.*

What is an Action Plan?

Even though your Community Plan may be completed, implementation often requires more planning.[3] As such, after prioritizing your goals from the Community Plan, the action plan should describe what you want to achieve and offer a framework for how it will be done.[4]

> *Implementation often requires more planning.*

Action plans can take many different forms and, in doing so, can serve a variety of purposes.[5] For example, an action plan can be created to implement a specific part of the Community Plan, such as constructing new housing or introducing new types of economic development. On the other hand, action plans can also respond to particular concerns in your community, like protecting culturally significant areas or improving emergency preparedness.[6]

However, no matter where the action plan comes from or what topic it addresses, its pieces should generally remain the same. The primary action plan pieces are illustrated in Figure 2 below.

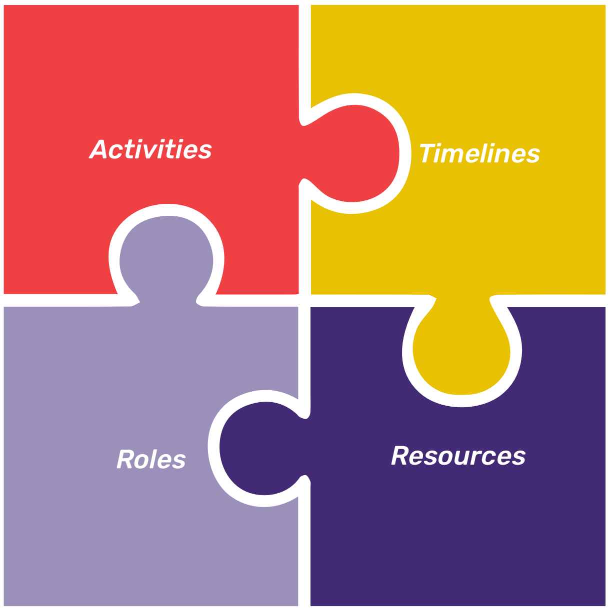


Figure 2* | *The Four Key Pieces of an Action Plan
Adapted from (National Aboriginal Lands Managers Association. Community Land Use Planning Toolkit, Version 1.0. Ottawa: Ministry of Aboriginal Affairs and Northern Development Canada. 2016.)

First, the plan should include a list of activities to start, support, and achieve your community's goal. Second, the plan should offer a timeline for when the activities will happen. This will make sure the process stays on schedule. Third, the plan should explain who is involved in each activity, as well as who is responsible for doing what. Fourth, in order to determine if the goal is doable, the plan should describe the resources needed for each of the activities.[7]

Why Create an Action Plan?

With everything that is included in a Community Plan, deciding how to get started can be difficult. Creating an action plan can help to simplify this step. Based on your community's top goals and objectives, the action plan can identify and communicate what needs to be done to achieve them.

Prioritizing actions is the first step to translate your community's plan into results on the ground. This can be done by considering things such as:[8]

Impact: the action positively affects the greatest number of community members, opposed to actions helping very few.

Urgency: the action addresses the most pressing issues or goals of your community.

Cost: the action does not require more resources than are available in the community to implement it.

Support: the action is believed to be important by the community members, Chief and Council members.

What are Some Common Challenges?

Carrying out an action planning process that is open to community members can help to prevent three major problems from arising.[9]

First, managing your community's expectations is key, as failing to do so can result in disappointment with results or frustration with the process. Second, poor communication with community members can result in them becoming disinterested. As the action plan's greatest asset, it is important to keep them informed and involved throughout the planning process. Third, lack of clarity can cause confusion and, in turn, disagreement among community members. This can pose major problems when your community is trying to come to an agreement on priorities.[10] These factors are important, as successful implementation of the action plan depends on community members taking ownership over it.

> ***ownership***
> community members are involved in creating the plan and, as a result, remain committed to helping it take shape

Careful budgeting and project management can also prevent a number of other issues from emerging. For instance, resources are often limited and, in cases where there are unexpected costs, it is important to have a backup plan. The same can be said for delays. Although it is important to have a schedule of activities in place, issues like bad weather and supply shortages can extend project timelines. Detailed reporting is also important for maintaining the support of partners and funders. Deciding who will be responsible for this task and when it needs to happen is a great way to improve chances of success.[11]

Who is Involved in the Process?

There can be many different people involved in creating an action plan. The process may be directed by a community's Planning Team, Land Advisor, or professional consultant.[12] The involvement of Chief and Council is also important for accessing resources. Regular communication with them can help to maintain their support, even in cases where administration changes.[13] However, when it comes to the action plan taking shape on the ground, it is the community members who will bring it to life through their shared efforts and everyday actions. For this reason, it is important all community members take part in the process. In doing so, their participation will help to support ongoing efforts and increase the chances of long-term success.[14]

> *When it comes to the action plan taking shape on the ground, it is the community members who will bring it to life through their shared efforts and everyday actions*

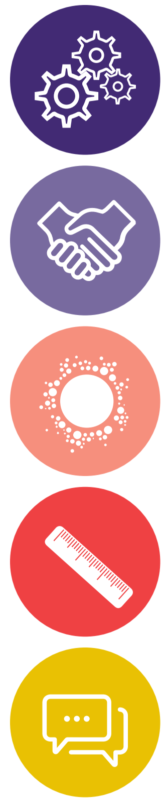
What Resources are Needed?

Creating an action plan will require financial support. This is important to consider before getting started, as the aim of the plan will largely determine how much is needed. If the costs are more than what is in your community's budget, additional resources may be required. To assist in this, Aboriginal Affairs and Northern Development Canada offers a section on funding resources in the CCP Handbook.[15] In other cases, the action plan may need to be adjusted to reflect the resources available, which should be decided with the community.[16]

Beyond money, creating an action plan also requires time. The community planning team, Land Advisor, Chief, Council, and members of the community will be expected to invest time into meeting, communicating, and reporting.[17] These activities will also require a certain level of skill. In some cases, professionals from outside the community can be hired to provide specific services. In order for the plan to succeed, these groups must work closely to avoid conflicts.[18]

How is a Successful Action Plan Created?

Though the planning process in First Nations' communities is very different from municipalities, the Federation of Canadian Municipalities (FCM) offers some helpful tips for moving beyond plans. As shown in Figure 3, there are 5 key things you can consider during the action planning process.[19]



Management
A group or managing body can be created to oversee the action planning process and review the progress of activities.

Partnerships
To gain support, non-government and government organizations at different levels can be engaged with.

Participation
Organizations and people from across the community should be included so everyone takes ownership over the plan.

Measurement
Since changes to the plan may occur along the way, measuring results can help you stay on track and meet your goals.

Communication
Designing a strategy for communicating with all members of your team will help to direct resources and stay on schedule.

Figure 3* | *Five Factors for a Successful Action Planning Process.
Adapted from (Clark, A. Passing Go: Moving Beyond the Plan. Ottawa: Federation of Canadian Municipalities. 2012. https://fcm.ca/Documents/tools/GMF/SS_PassingGo_EN.pdf. p. 3.) *Used with permission.*

Final Thoughts

In summary, action plans can help turn your community's ideas into results on the ground. Once you have completed your Community Plan, as well as established its goals and objectives, an action plan can be created. To increase the chances of seeing positive results, make sure members of your community are actively involved throughout the process!

Further Reading

Comprehensive Community Planning Training Materials (2007-09) by Centre for Indigenous Environmental Resources

Available at: http://www.yourcier.org/comprehensive-community-planning-training-program-materials.html

Moving Toward a Stronger Future: An Aboriginal Resource Guide for Community Development (2015) by Department of Public Safety and Emergency Preparedness

Available at: https://www.publicsafety.gc.ca/cnt/rsrcs/pblctns/mvng-twrd-strngr-ftr/index-en.aspx

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,* 2016, Accessed October 24, 2017, http://www.aadnc-aandc.gc.ca/DAM/DAM-INTER-BC/STAGING/texte-text/ccphb2013_1378922610124_eng.pdf, p. 15.
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5 National Aboriginal Lands Managers Association, "Community Land Use Planning Toolkit, Version 1.0," *Indigenous and Northern Affairs Canada,* 2016, p. 53.
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13 INAC, 2016, p. 49.
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PRIORITIZING ACTIONS

by Brody Osadick
Indigenous Planning Studio
January 2020

Summary

This fact sheet demonstrates two ways to prioritize activities, timelines, roles and resources within your community's action plan. In order to continually move towards your community goals, it is important to acknowledge what actions can be taken right now and what actions can be taken in the future—this is where the process of prioritizing actions comes into play.

Keywords: direction setting, managing the process, planning team

Why Prioritize?

The same questions often come up when implementing a Comprehensive Community Plan. "How will we get there?" and "What do we need to do to get there?"

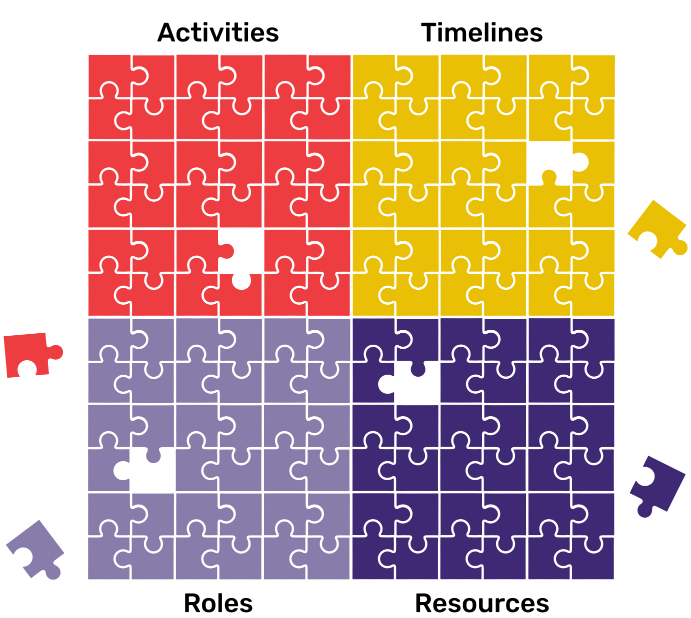

Figure 1 | The four key pieces of an action plan.
Adapted from (National Aboriginal Lands Managers Association. "Community Land Use Planning Toolkit, Version 1.0." Ottawa: *Ministry of Aboriginal Affairs and Northern Development Canada*. 2016.)

The laundry list of ideas on how to achieve your community's goals and objectives may at times be overwhelming. There may be a number of ideas, from a number of people, that address a number of issues. This is where an action plan describes in detail the activities, timelines, roles, and resources needed to achieve the objectives identified in your Comprehensive Community Plan (CCP).[1] Prioritization techniques can help measure how feasible it is to reach a particular goal, but also the type of action most appropriate to the local context.[2]

What is a Selection Criteria?

Selection criteria are a set of principles, values, demands, constraints, and risks used to determine the best course of action to address a community need or objective.[3] The way in which decisions are justified helps build trust and transparency through careful consideration of, and collaboration between, all the people impacted by the decision.[4] There are many different methods to ensure such decisions are based on value and need, as opposed to mere popularity. This fact sheet references two techniques to prioritize actions, both of which include the use of selection criteria.

How Do You Prioritize in Practice?

Whether your community's priority is promoting physical activity, affordable housing, or biodiversity, action plans help brainstorm and coordinate strategies in your CCP.[5] For more information on common challenges and best practices on Action Planning, see *Creating Action Plans* (Sinclair, 2018). Once the necessary components of your action plan are in place, your community planning team must determine which actions are most feasible and cost-effective. This fact sheet outlines two flexible techniques to prioritize your activities, timelines, roles and resources within your action plan: the **Scoring Technique** and the **Strategy Grid Technique**.

For more information on common challenges and successful practices on Action Planning, see the *Creating Action Plans* fact sheet.

Scoring Technique

The Scoring Technique is useful when many ideas are still in question and only a select few options are needed.[6] The Scoring Technique works by ranking each action item based on a pre-established set of criteria—thus calculating a score for each option. According to the Indigenous and Northern Affairs Canada CCP Handbook, when prioritizing actions, common criteria include impact, urgency, capacity, cost, risk, and political support from Chief and Council.[7] For example, if your community goal is to increase the number of affordable housing units, possible actions might fall under the themes of research, advocacy, education, direct funding, building partnerships, grant applications, and so forth. As illustrated in Table 1 below, each action item is numerically ranked on a scale based on its percieved impact, urgency, capacity, cost, risk, and political support. By assigning numerical scores to the criteria, action items can be evaluated in a quantitative manner.

To provide more detailed scores and to ensure collective and individual values are accounted for in the decision-making process, a common practice is to weigh each criterion based on its relative importance.[8] If the community is experiencing a housing shortage, urgency within the community might contain a heavier "weight" despite (for example) the significant initial cost of investing in affordable housing. Items which characterize urgency and immediate action, such as direct subsidies for below-market rental units, will therefore recieve a higher score than say, a five-year research initiative.

Criterion weighting helps adapt your action and implementation plan to the needs and context of your community.[9] The lead of this type of exercise should encourage input and participation from your planning team, Elders, and community experts. Table 1 illustrates a Weighted-scoring Technique for the affordable housing example.

Scoring Technique Formula

Action Item Score = [Likert Rank] x [Weight]

***Table 1** | Applying the Weighted-scoring Technique to prioritize actions on affordable housing.*
Adapted from (National Association of County and City Health Officials. "Guide to Prioritization Techniques." n.d. Accessed October 2020. https://www.naccho.org/uploads/downloadable-resources/Gudie-to-Prioritization-Techniques.pdf; and, Indigenous and Northern Affairs Canada. "CCP Handbook: Comprehensive Community Planning for First Nations in British Columbia, Third Edition." 2016. Accessed October, 2020. http://www.aadnc-aandc.gc.ca/DAM/DAM-INTER-BC/STAGING/texte-text/ccphb2013_1378922610124_eng.pdf, p. 46.)

Criteria	Impact	Urgency	Capacity	Cost	Risk	Political Support	Total
Weight	1.5	3.0	1.0	2.0	2.5	2.0	
Likert Rank	1 = Low impact 2 3 = Moderate impact 4 5 = High impact	1 = Long-term 2 3 = Med-term 4 5 = Short-term	1 = Not feasible 2 3 = Challenging 4 5 = Very feasible	1 = Very expensive 2 3 = Fair price 4 5 = Inexpensive	1 = High Risk 2 3 = Moderate Risk 4 5 = Low Risk	1 = No support 2 3 = Some objections 4 5 = Full support	
Research	4 (x 1.5) = **6**	1 (x 3.0) = **3**	4 (x 1.0) = **4**	3 (x 2.0) = **6**	5 (x 2.5) = **12.5**	4 (x 2.0) = **8**	**39.0**
Advocacy	3 (x 1.5) = **4.5**	4 (x 3.0) = **12**	3 (x 1.0) = **3**	4 (x 2.0) = **8**	4 (x 2.5) = **10**	2 (x 2.0) = **4**	**41.5**
Education	1 (x 1.5) = **1.5**	2 (x 3.0) = **6**	5 (x 1.0) = **5**	4 (x 2.0) = **8**	5 (x 2.5) = **12.5**	2 (x 2.0) = **4**	**37.0**
Direct Funding	5 (x 1.5) = **7.5**	5 (x 3.0) = **15**	2 (x 1.0) = **2**	1 (x 2.0) = **2**	2 (x 2.5) = **5**	5 (x 2.0) = **10**	**41.5**
Partnerships	4 (x 1.5) = **6**	3 (x 3.0) = **9**	4 (x 1.0) = **4**	4 (x 2.0) = **8**	3 (x 2.5) = **7.5**	5 (x 2.0) = **10**	**44.5**
Grants	4 (x 1.5) = **6**	3 (x 3.0) = **9**	2 (x 1.0) = **2**	3 (x 2.0) = **6**	2 (x 2.5) = **5**	5 (x 2.0) = **10**	**38.0**

Action Items

Strategy Grid Technique

The Strategy Grid Technique takes a hands-on, qualitative approach to prioritize actions. As illustrated below in Figure 2, the Strategy Grid works by having four quadrants with one criteria assigned to each axis.[10] Each action item is strategically placed within one of the four quadrants to measure each item's relative importance.

Unlike the Scoring Technique, the Strategy Grid relies on two criteria only. There are numerous combinations of criteria that can be used in different planning contexts. The two criteria in the example below are 'Need' and 'Feasibility.'

- **High Need / High Feasibility:** Actions in this square have high impact and can be easily implemented. These actions should be first choice.
- **High Need / Low Feasibility:** Actions in this square have high impact but require additional resources to be implemented. These actions are likely worthwhile.
- **Low Need / High Feasibility:** Actions in this square have low impact and can be easily implemented. These actions may need to be reconsidered—might be worthwhile.
- **Low Need / Low Feasibility:** Actions in this square are the lowest priority items. Action items in this square have low impact and are not easily implemented.

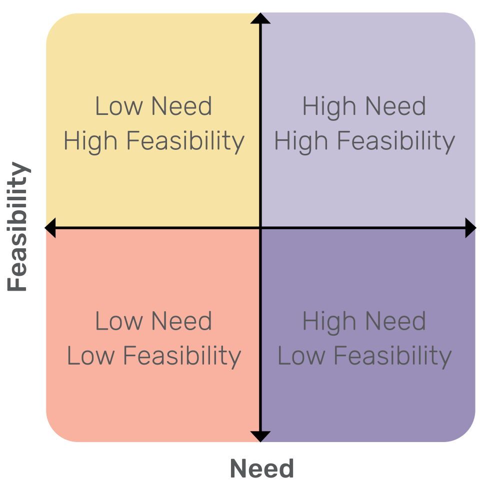

Figure 2 | Strategy grid technique to prioritize actions.
Adapted from (National Association of County and City Health Officials. "Guide to Prioritization Techniques." n.d. Accessed October 2020. https://www.naccho.org/uploads/downloadable-resources/Gudie-to-Prioritization-Techniques.pdf; and, Indigenous and Northern Affairs Canada. "CCP Handbook: Comprehensive Community Planning for First Nations in British Columbia, Third Edition." 2016. Accessed October, 2020. http://www.aadnc-aandc.gc.ca/DAM/DAM-INTER-BC/STAGING/texte-text/ccphb2013_1378922610124_eng.pdf, p. 46.)

The Strategy Grid is commonly used in many other planning contexts, which may include engaging youth, establishing a planning team, setting goals and objectives, mapping community assets, and so forth. Need and feasibility represent one of many ways the Strategy Grid can be applied when implementing your action plan.

Dotmocracy

Dotmocracy, also known as dot-voting, is a common facilitation method designed to engage people and solicit input on decisions affecting the community at large using dot-stickers on poster boards.[11] Dotmocracy can be incorporated into a wide variety of community engagement exercises.

Source (Stairs, Haley. "Dots and Dotmocracy." 2018. Accessed October, 2020. theaquinian.net/tag/dotmocracy/)

How dot-voting typically works is each participant is given a set number of dot stickers as determined by the facilitator. Each participant then places dot stickers next to each option or action item presented. A Strategy Grid can also be used in a dot-voting setting to help guide participants through the decision making process. Other variations of dot-voting may include using different colour dots to illustrate alternative viewpoints or values (e.g., green for "like" and red for "dislike").

Final Thoughts

The process of prioritizing actions involves deciding between overlapping actions while incorproating the agreed-upon criteria into the final decision.[12] But who makes the final decision about which actions to implement? And what, if any, is the role of the planner and the community in the decision-making process? While the two techniques provided in this fact sheet have limitations in terms of the depth of detail produced, both are a general reflection of the relative importance of competing wants, needs, and resources among various groups and actors. Your community planning team, which may consist of land managers, Chief and Council, Elders, youth and family groups, and leaders of local community organizations, should play a large part in the process of prioritizing and implementing actions.

> *Your community planning team should play a large part in the process of prioritizing and implementing actions.*

An action plan answers the "How will we reach our goals?" whereas this fact sheet attempts to address the question "What do we need to do, and what can we actually do to reach our goals?" The way in which your planning team approaches the implementation stage has a large influence on the outcomes your community plan achieves. By providing two adaptable techniques for prioritizing the most appropriate policy, program or project, your community will be better equipped to continually move towards your overall vision.

Further Reading

Gaining Momentum: Sharing 96 Best Practices of First Nations Comprehensive Community Planning by Jeff Cook

Jeff Cook provides a number of principles, strategies, and techniques to create and implement your community's comprehensive plan. Page 82 describes in detail how to "Sequence Actions for Easy Wins" by providing descriptions and applicable examples of best practices.

Comprehensive Community Planning Toolkit: Finding Bimadizowin by Nishnawbe Aski Development Fund

Nishnawbe Aski Development Fund is a non-profit aboriginal organization that provides financing, business, and community planning supports to First Nations in Ontario. Pages 100 to 106 of this toolkit illustrates alternative approaches to prioritize and select actions by outlining the process, tips, examples, and templates.

Guide to Prioritization Techniques by National Association of County and City Health Officials

This report outlines the preliminary steps that are needed to prioritize actions, and demonstrates the range of techniques health authorities across the United States are using to address widespread health issues.

Endnotes

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2. National Association of County and City Health Officials. "Guide to Prioritization Techniques." (n.d.) Accessed October 2020. https://www.naccho.org/uploads/downloadable-resources/Gudie-to-Prioritization-Techniques.pdf.
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5. Sinclair, Evan. 2018. p. 2.
6. National Association of County and City Health Officials. (n.d.)
7. 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, 2020, http://www.aadnc-aandc.gc.ca/DAM/DAM-INTER-BC/STAGING/texte-text/ccphb2013_1378922610124_eng.pdf, p. 46.
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11. Dotmocracy [Webpage], n.d. "What is Dotmocracy?" Accessed January 2020. https://dotmocracy.org/what_is/
12. Harper, Jack. 2009. p. 93.

MANAGING PROJECTS

by Melanie Messier
Indigenous Planning Studio
January 2020

Summary

This fact sheet discusses what project management is, what common issues are, and how to improve project management practices. Project management is important for your community because it helps organize a project's size, funding, timing and other components that relate to management.

Keywords: managing the process, direction setting, planning team

What Is Project Management?

Project management has a step-by-step lifecycle methodology which is broken down into 5 phases, shown in Figure 1:

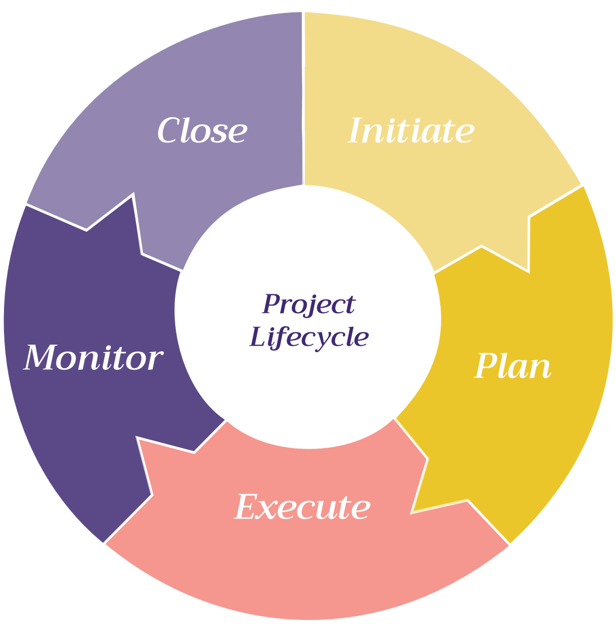

Figure 1 | *Project Management Lifecycle Methodology.*

Adapted from (Singh, A. "A step-by-step project lifecycle methodology guide to boost project performance" Digital image. *GetApp*. April 4, 2019. Accessed January 28, 2020. https://lab.getapp.com/step-by-step-project-lifecycle-methodology/.)

Project management uses processes, skills, knowledge, and results to project activities and create a clear direction for your project.[1] A project is planned and coordinated to achieve a certain goal. Projects can either be an individual or collaborative effort and will often have main objectives that are defined by desired outcomes for your community. Questions you may want to consider when designing a project can include:

How much time will this project will take? How much will it cost? Who will be a part of my project? In addition, to many other considerations.

Why Is Project Management Important?

Projects are often under pressure to be completed on time and if they are not planned properly, they may lack the necessary time and resources needed to finish. Project management is important because it gives direction to tasks by establishing clear goals and objectives. It can help you determine if your project is realistic by setting expectations for deadlines, budgets, balancing resources, and assigning tasks to other team members.

Projects are often under pressure to be completed on time and if they are not planned properly, they may lack the necessary time and resources needed to finish.

The purpose of project management is to ensure that quality is being delivered at every stage of the process. Leadership is important in project management because it allows for a team to create a vision and receive coaching. Finally, leaders can help inspire the team to perform at its best.

What Are the Key Components of Project Management?

1 Project Initiation

This process begins by recognizing a committment to the project and identifying a need within the community. This can come in the form of an expression of interest, a call for proposals or directly from your community.[2] The need to apply for funding or sources of funding should be identified in this stage. Additionally, the project manager can direct team members to conduct research and gather data in preparation for the planning phase.[3]

2 Project Planning

Create a workable plan for how your community or team will complete the project and meet your goals. This workplan can include information such as what activities will be accomplished, what the budget will be, member roles and duties, and project deliverables. The level of depth needed for each workplan varies; e.g., a comprehensive community plan (CCP) would require much more pre-planning than a one-time community engagement event. Factors such as detailed phases, limited funding, specific objectives and criteria, and short time frames could all affect such an important project like a CCP.[4]

S.M.A.R.T. Goals

To make sure your goals are clear and reachable.

Project goals should be set out in this phase and can include a goal-setting process, such as S.M.A.R.T. Goals. This process identifies how to create goals that are clear and measurable, as shown in Table 1.

3 Project Execution

This phase includes carrying out the workplan created in the planning section and considering how resources will be distributed to certain areas of the project. This can include how team members will use their time toward certain tasks and how the team will stay on track with their identified goals. During this phase, tools such as status reports and regular meetings can help a project stay on task and remind members of their responsibilities.

4 Project Monitoring

The focus of this phase is to ensure that the project's main objectives are being met. Project managers are responsible for monitoring the success of the goals set out in the initial planning phases and checking if they align with the original workplan. Monitoring is important to ensure that the project has moved in the right direction and that progress has been documented.

Ways to document, monitor, or control projects include progress reports, final reports, or reviewing key performance indicators (KPIs). KPI indicators can include:

1. ***Project objectives:*** measuring if a project is on schedule and if progress matches stakeholder objectives.
2. ***Quality deliverables:*** measuring if tasks are being completed.
3. ***Cost tracking:*** keeping financial statements and tracking spending on a project.
4. ***Project performance:*** monitoring if any changes have taken place throughout the length of the project and identifying what challenges were encountered.

For more information on KPIs, see the *Understanding KPIs* fact sheet.

Table 1 **|** *S.M.A.R.T. Goals.*
Adapted from (Eby, K. "Demystifying the 5 stateges of project management." Digital image. Smart Sheet. May 29, 2018 Published. Accessed January 28, 2020. https://www.smartsheet.com/blog/demystifying-5-phases-project-management.)

	Description	Question
Specific	Be clear and specific	Why is this goal important?
Measurable	Track your progress	How many? How much?
Achievable	Be realistic to be successful	How can I accomplish this?
Relevant	Ensure your goal matters	Is this the right time?
Time-bound	Set deadlines	What can I do today?

5 Project Closure

The final phase of the project includes wrapping up all tasks outlined within the workplan.

Closing tasks can involve:

1. ***Deliverables:*** Completing all deliverables outlined in the initial planning process. Deliverables can include: visual elements, final reports, and presentations. E.g., CCP

2. ***Debrief:*** Conducting meetings with team members to identify successes and challenges.[5]

3. ***File Management:*** Storing or archiving important documents for a period of a year.[6] This is essential for providing information to whoever may need it in the future.

Following the completion of the project you may want to provide a report to the community describing what took place during the project and the overall results. This may include presenting to the community and/or to Chief and Council for a final approval of the project.

What are Some Common Challenges?

Challenges may arise during projects. Common challenges and potential solutions are identified below:

1 Team Conflict

Schedule a team meeting to discuss challenges and ways to move forward with a mutually agreed upon plan.

2 Undefined Goals

Clarify goals with team members and stakeholders to ensure identified goals meet the intent of the project and your community.

3 Unrealistic Deadlines

Create a detailed schedule to prioritize tasks that are overdue or of greater importance.

4 Risk Management

Identify potential risks associated with the project ahead of time but also identify new risks as they arise.

For more information on identifying risks, see the *SWOT Analysis* fact sheet.

Critical Roles in Project Management?

In order to have a successful project, you need the right people for the right roles! Figure 3 includes team members' roles and responsibilities.

PM

Project Manager

The project manager will plan, oversee, budget, and document all aspects of the project.

TL

Team Leader

The team leader reports directly to the PM. They are an initiator, negotiator, coach, and a working member of the project.

TM

Team Members

Team members bring a variety of needed skills to the project, including problem-solving, organization, interpersonal, and more.

SC

Project Steering Committee

A steering committee consists of stakeholders or sponsors. They oversee items such as budgets, schedules, and key project elements.

Figure 3 | Critical roles in Project Management.
Adapted from (Harvard Business Review Staff "Five Critical Roles in Project Management." *Harvard Business Review*. November 3, 2016. Accessed January 28, 2020. https://hbr.org/2016/11/five-critical-roles-in-project-management .)

Developing a Project Management Checklist[7]

- ☐ Project title, start date, finish date
- ☐ The project coordinator and team members
- ☐ The value of the project, and funding sources
- ☐ The reporting requirements (by date)
- ☐ Key contacts - consultants, funding officers
- ☐ Final comments section
- ☐ Management or Chief and Council sign off - closing the file

Figure 2 | *Group work.*
Source (Kozminski University. "Group Work." Digital image. *Flickr*. December 10, 2011. Accessed January 25, 2020. https://flic.kr/p/eByJSr.)

Final Thoughts

Project management can help your team stay on track. The project manager and team members are responsible for setting clear goals and completing tasks.

Each phase in the project management process can help the team understand where it needs to improve or if it's on the right track. If the team works together and identifies how it can track its progress, then it will have a better chance of being successful. Project management can help you stay on time, be successful, and produce results that the team is proud of.

Further Reading

Indigenous Economic Reconciliation: Recommendations on Reconciliation and Inclusive Economic Growth for Indigenous Peoples and Canada by the National Economic Indigenous Board

http://www.naedb-cndea.com/reports/NIEDB%20-%20Economic%20Reconciliation%20-%20Final%20Report.pdf

First Nations Communications Toolkit by Indigenous and Northern Affairs Canada

https://www.aadnc-aandc.gc.ca/eng/1100100021860/1100100021862

Endnotes

1 Association for Project Management, "What is Project Management," Association for Project Management. 2020. Accessed January 28, 2020, https://www.apm.org.uk/resources/what-is-project-management/
2 Aboriginal Financial Officers Association, "Project Management: A Practical Guide for Aboriginal Management," Aboriginal Financial Association of Canada. 2020. Accessed January 28, 2020. https://www.afoa.ca/afoadocs/L3/L3a%20-%20Project_Management.pdf
3 AFOA, 2020, p. 5.
4 AFOA, 2020, p. 5.
5 APM, 2020.
6 APM, 2020.
7 AFOA, 2020, p.10.

FINDING ALLIES

by Rayan Akhtar Khavari
Indigenous Planning Studio
April 2020

Summary

This fact sheet outlines who can be an ally, when to find an ally, where to find allies, what to consider before finding allies, how to build a relationship with an ally, how allies can support a planning process, and what kind of boundaries are needed.

Keywords: planning team, communication tools, managing the process, building capacity, direction setting

Who Can Be an Ally?

An ally is an associate who provides support, "coalition, partnership, coordinated actions, or supportive strategies" amongst groups of communities to change unjust and inequitable systems and institutions.[1] Allies can be individuals, other Indigenous communities, non-profit organizations, business corporations, and/or governments. Allies can provide support by "disrupting oppressive spaces by educating others on the realities and histories of marginalized people."[2]

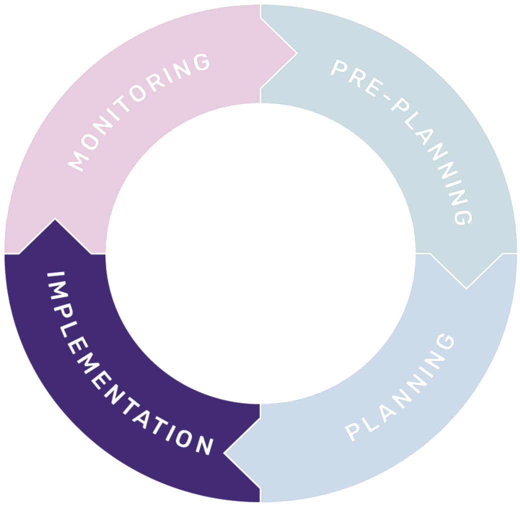

Figure 1 | The four phases of creating a Community Plan.
Adapted from (Aboriginal Affairs and Northern Development Canada / Indigenous Services Canada. CCP Handbook – Comprehensive Community Planning for First Nations in British Columbia. 2016. http://www.aadnc-aandc. gc.ca/eng/1100100021966/1100100021970. p. 14.) Used with permission.

When to Find an Ally?

During a planning process, it is common that your First Nation may find the need to expand its circle and find allies from the wider area to support and engage in the planning process. There is not a specific formula regarding when is the best time to find allies as the planning process is ongoing, and your community determines the process.[3] The community planning team needs to assess their reality as they move forward, and an ally can engage at any point in the planning process.[4]

> *There is not a specific formula regarding when is the best time to find allies as the planning process is ongoing.*

Where Could You Find Allies?

Your committee will evaluate and determine if any parties could be an ally during a planning process. It is advisable that your community ask for referrals from other communities. Potential allies can be identified through these two elements:[5]

1. Allies are promoting social equality for all marginalized groups.
2. Allies are accountable and committed to building a meaningful relationship with your community.

It is important to note that it is not appropriate for any individual, other communities or organizations to self-identify as an ally.[6]

What to Consider before Finding Allies?

Before finding allies, it is important for your community to first identify the internal strengths and weaknesses and the human and material resources available within the community.[7] It will help your community to decide what kind of allyship is needed to support the planning process.

In addition, understanding the reality of your community will help in communicating clearly with the ally regarding their roles, where their expertise will be needed, and how long they should anticipate committing to the planning process. It is crucial for your community to understand that it is not compulsory to find an ally. These are some of the pros and cons to consider before finding allies:

PROs

Allyship could...

- Be an additional human and financial resource.[8]
- Provide opportunity for community engagement and support.[9]
- Provide opportunity to exchange knowledge and skills unique to each partner.[10]
- Provide training and build the capacity of your community.[11]
- Set up a platform to find positive solutions to common challenges and concerns.[12]
- Allow your community and others to establish meaningful and accountable relationships.[13]

An ally could...[14]

- Have a lack of understanding of the central values of different First Nation cultures.
- Take leadership on behalf of your community.
- Deprive opportunities for your community to grow and learn.
- Intrude and interfere in the planning process and affairs of your community.
- Have expectations from your community during the planning process.

CONs

How to Build a Relationship with Allies?

Finding allies allows your community to build meaningful relationship with other communities. Your community may want to establish a positive, transparent, and structured collaboration with your allies. There are a few suggestions that your community can consider sharing with allies to build positive relationships:[15]

1 Respectful and Committed Relationships

The ally has to listen, be open-minded, and actively look for opportunities to assist your community in the planning process. Allies need to develop an understanding that planning with your community is an on-going process and requires long-term commitment.

2 Reflection on the Motive of Involvement

The ally needs to internally reflect on their reason, motive, and agenda before starting to engage in a planning process with any First Nation. Planning with First Nations is a relationship that requires trust and detachment from other ways of planning. It is important for the ally to know that your community guides the planning process.

3 Humble Posture of Learning

The ally needs to familiarize themselves with the culture and central values of your community. Allies may need to unlearn what they are accustomed to. Allies also need to continually ask questions to clarify and avoid any false assumptions.

How can Allies Support a Planning Process, and What Kinds of Boundaries are Needed?

Collaborating with different allies in the planning process requires all parties to understand each other's different perspectives, which is critical for the planning process. A few important guidelines for collaborating with allies in the planning process are:[16]

Be clear in communicating your community's vision and goals to your allies

Create a respectful environment that nurtures relationships between allies

Encourage diverse and inclusive involvement between different stakeholders

Develop creative and innovative strategies in planning with your allies

Consider allyship as a medium for your community to build internal capacity and exchange knowledge with allies

Protect the values of your community while establishing positive external relations with your allies

Figure 2 | Guidelines for working with allies.

Final Thoughts

In summary, finding allies allows your community and others to establish meaningful and accountable relationships. Finding allies gives opportunity for your community to have multiple perspectives, as your community may exchange knowledge, experience, and expertise with allies.

Further Reading

Best Practices in Aboriginal Community Development: A Literature Review and Wise Practices Approach by Wesley-Esquimaux, C., & Calliou, B.

This article provides extensive review of the literature on best practices in Aboriginal community development and critiques of Aboriginal community development practices.

https://www-deslibris-ca.uml.idm.oclc.org/ID/225439

The 7 C's: A First Nations' Guide to Planning and Reporting Standards by British Columbia First Nations' Data Governance Initiative

This guide provides seven categories of standards that apply to both planning and reporting. The guide also presents some of the main learnings on planning and reporting of First Nation communities of British Columbia.

https://static1.squarespace.com/static/558c624de4b0574c94d62a61/t/577e5cf9d482e949405cfd23/1467899162776/THE_7_CS_-_PLANNING_AND_REPORTING_GUIDE_-_FINAL_2015-2016.PDF

Endnotes

1. L. Davis, "Alliances Re/envisioning Indigenous-non-Indigenous Relationships", *University of Toronto Press*, 2010.
2. Dakota Swiftwolfe, "Indigenous Ally Toolkit", *Montreal Urban Aboriginal Community Strategy Network*, n.d., https://physiotherapy.ca/sites/default/files/indigenous_ally_toolkit_en.pdf
3. Indigenous and Northern Affairs Canada (INAC), "CCP Handbook: Comprehensive Community Planning for First Nations in British Columbia," *Indigenous and Northern Affairs Canada*, 2006, http://www.aadnc-aandc.gc.ca/DAM/DAM-INTER-BC/STAGING/texte-text/ccphb_1100100021973_eng.pdf
4. INAC, 2006
5. Jackson Smith, Cassandra Puckett and Wendy Simon, "Indigenous Allyship: An Overview", Wilfrid Laurier University, 2016, https://beta.fpic.info/media/library/resources/indigenous-allyship-overview/Indigenous_Allyship_Toolkit.pdf
6. Smith, 2016
7. INAC, 2006
8. INAC, 2006
9. INAC, 2006
10. Davis, 2010
11. INAC, 2006
12. Davis, 2010
13. Smith, 2016
14. Smith, 2016
15. Swiftwolfe, n.d.
16. Davis, 2010

SELECTING TLE LANDS

by Justin Loma
Indigenous Planning Studio
March 2020

Summary

This fact sheet explains three possible stages to utilize in selecting lands for Treaty Land Entitlement. The process can include community area evaluation, site analysis and site selection. Selecting land is a key step during the complicated Treaty Land Entitlement process.

Keywords: collecting data, analyzing data, direction-setting, mapping, building capacity

What Is Treaty Land Entitlement?

First Nations in Manitoba have land owed to them from unfulfilled treaty promises. These communities are accessing lands through the Treaty Land Entitlement (TLE) process. The Manitoba Treaty Land Entitlement Framework Agreement[1] identifies which First Nations are owed lands through TLE and the total number of acres they are to be allotted. Many First Nations, the Government of Canada, the Province of Manitoba are signatories to this agreement. The agreement seeks to fulfill federal obligations to provide reserve land as part of previously signed treaties.[2]

> *First Nations in Manitoba have significant land owed to them from unfulfilled treaty promises.*

Figure 1 | *Outline of stages for selecting lands.*
Adapted from (Greyhill Advisors. "The Site Selection Process." Digital image. *Greyhill Advisors*. March 11, 2016. Accessed April 2, 2020. http://www.greyhilladvisors.com/site-selection-process#PhaseI.)

First Nations must file a Treaty Land Entitlement (TLE) claim with the Government of Canada to acquire lands under this process.[3] This factsheet outlines three phases in selecting lands for a Treaty Land Entitlement claim. These phases are community area evaluation, site analysis, and site selection.

1 COMMUNITY AREA EVALUATION

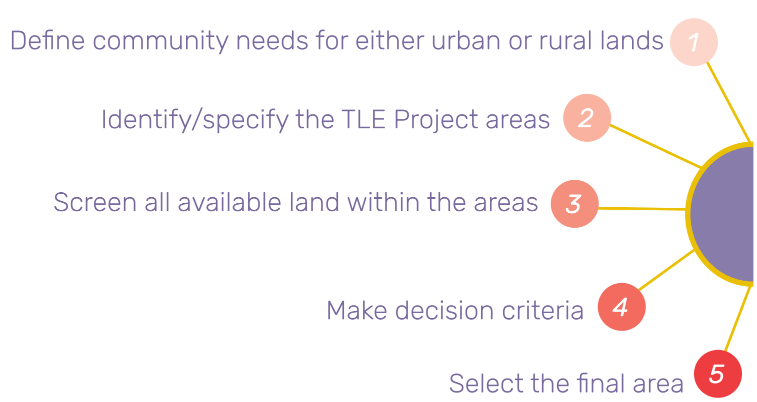

Figure 2 | *Five steps for area evaluation.*
Adapted from (Thinking Maps. Accessed April 2, 2020. https://www.tes.com/lessons/QUmj4qsqqKYrfA/copy-of-thinking-maps.)

How Is a Community Area Evaluation Conducted?

A First Nation can carry out an evaluation of suitable and desirable land in the region. Under TLE, First Nations can either request Crown land be coverted to reserve, or request federal funds to purchase private land to convert to reserve. Figure 2 shows five possible steps to conducting an area evaluation.

Who Is Involved?

Community Area Evaluation involves the participation of the entire community. The perspectives and knowledge of Elders, Chief and Council, community members, and youth are vital to Community Area Evaluation and the entire process of selecting lands for TLE.[4] Figure 3 below shows a model used by the Penticton Indian Band.[5]

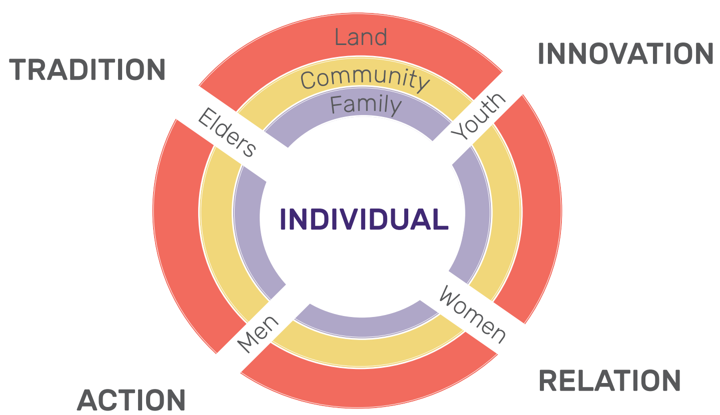

Figure 3 | *Holistic Indigenous community participation.*
Adapted from (Hodge, Gerald, Heather M. Hall, and Ira M. Robinson. *Planning Canadian Regions Second edition*. Vancouver: UBC Press, 2017, p.174)

Land Use Mapping Technology

A land manager can also use land use mapping technology to provide analysis of where suitable land exists. This information would inform the Community Area Evaluation.

2 SITE ANALYSIS

How Is a Site Analysis Conducted?

A Site Analysis can be conducted within the evaluated area of interest. While full participation is ideal, Land managers and Elders may conduct the Site Analysis on behalf of the community. They can develop criteria for site selection, make a shortlist of potential sites, and conduct community engagement sessions. Figure 4 shows a summary of the steps involved in Site Analysis.

Who Should I Contact?

For property within the City of Winnipeg, contact the City of Winnipeg Property Assessment Services Department.[6] For property in another municipality, contact the Property Assessment Branch of the Government of Manitoba Municipal Relations Department.[7]

Figure 4 | *Five steps in Site Analysis.*
Adapted from (Greyhill Advisors. "The Site Selection Process." Digital image. Greyhill Advisors, March 11, 2016. Accessed April 2, 2020. http://www.greyhilladvisors.com/)

3 SITE SELECTION

How Is a Site Selected?

Selecting the desired site is the final step before a claim can be filed. A financial evaluation can be conducted to compare all costs involved. If purchasing privately-owned land is desired, it is necessary to plan for price negotiations and to know what is feasible for your community to pay.

Final Thoughts

Many First Nations have a right to increase their land base through Treaty Land Entitlement. The process is complicated, but can result in economic opportunities, social benefits, and the return of traditional territories. While there is more to the process than this quick factsheet outlines, selecting the land in question and identifying the intended uses of the land is the first, and a key, step.

Further Reading

Treaty Land Entitlement by Indigenous and Northern Affairs Canada

Provides information about the numbered treaties and individual TLE settlements. Also includes a summary of TLE Lands converted to Reserves.

https://www.aadnc-aandc.gc.ca/eng/1305306991615/1305307177471

Treaty Land Entitlement - The Indigenous and Northern Relations by Province of Manitoba

Record of land transfers to Canada and First Nation reserves can be found at the Manitoba Relations website under "Indigenous and Northern Relations." Also has a record of Treaty Land Entitlement settlement claims validated by Canada, and a list of First Nations entitled to the claims.

Endnotes

1 The Government of Manitoba. "Treaty Land Entitlement Framework Agreement." The Government of Manitoba, 1997. Accessed April 8, 2020. https://www.gov.mb.ca/inr/resources/pubs/tle%20framework%20agreement%201997.pdf.
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7 Municipal Relations. "Property Assessment." Province of Manitoba, 2020. Accessed April 8, 2020. https://www.gov.mb.ca/mr/assessment/index.html.

SHARING YOUR COMMUNITY PLAN

by Breda Vosters
Indigenous Planning Studio
December 2016

Summary

This fact sheet provides information about what it means to share a Community Plan, why it is important to share, who a Community Plan should be shared with, how to share it, and when to share it.

Keywords: community engagement, reporting back, Elders / knowledge keepers, youth, planning team

What Does it Mean to Share a Community Plan?

Once your Community Plan is finished, your community should be able to see and understand the final product. Many Community Plans have many goals and objectives. These should be the focus when you share your plan with community members.

Figure 1 | *Community meeting.*
Adapted from (Armstrong, George. "FEMA CR provides disaster information at community meeting." Digital image. Wikimedia Commons. August 27, 2008. Accessed February 5 2017. https://commons.wikimedia.org/wiki/File:FEMA_-_37821_-_FEMA_CR_provides_disaster_information_at_community_meeting.jpg.)

Why is it Important to Share the Community Plan?

A Community Plan is created by your community, for your community. It is important to openly share a Community Plan for many of the same reasons that community engagement is so important in the creation of a Community Plan. The reasons for wanting to share a product can be thought of in three main ways:[1]

- Sharing for awareness: making people aware of the work that has been done.
- Sharing for understanding: giving people a better understanding of the work that has been done.
- Sharing for action: giving the community the right tools to carry out the goals of the plan by first sharing the plan itself.

One of the main benefits of a Community Plan is to empower community members. This can help them be more self-sufficient and be able to respond to change.[2] Your communication strategy shares the plan's main points. This raises awareness in the community about its direction for the future. Then everyone can work together to achieve the vision for the future.

> "You have to have the [Plan] at your finger-tips – to get refocused and remind people that we have done a plan. To remind people that we have looked at this and have a common goal and vision. People have to know that we will have a chance to speak again. The [Plan] is not a finished project. We need to feed it bread and water."[14]
>
> – Unknown, Cook 2009, p.97

Who Should a Community Plan be Shared With?

Creating a Community Plan is generally a very inclusive process. Often, this helps create a sense of community ownership over the final product. This spirit of ownership should continue as your share the final product with the whole community. Make sure to share the plan's important points with family heads, Elders, youths, community groups, band administration, Chief, and Council.[3,4,5] You can do this using different methods, depending on your audience.

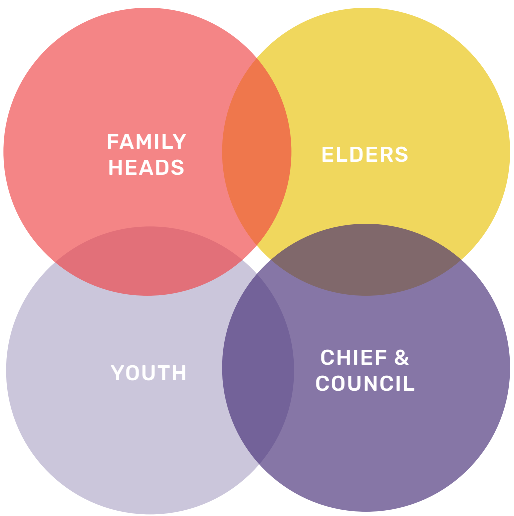

Figure 2 | *Groups of people to include when sharing the plan.*

> "Building inclusion during the CCP process is fundamental to success."[15]
>
> – Cook 2009, p.31

How Can a Community Plan be Shared?

When you share your Community Plan, it marks the transition from planning to implementation. At this point, the main responsibility for the plan shifts from the community to leadership and management.[6] The first step to share a Community Plan should be to "develop your key messages" and decide what is most important to share with the community.[7] Figure 3 shows the important parts of the plan to be shared with your community.

As illustrated in the diagram, decide on your key messages first by meeting with community leadership, management groups, Chief, and Council. Main elements include goals, cultural and economic benefits, and governance.[8]

After the key messages and main elements have been decided, they can be shared with your community in a number of ways. Every community is unique and has its own unique set of challenges, opportunities and resources. For this reason, choose communication methods that work best for your community.[9] Some of these methods may be similar to the ones used for creating the Community Plan. Make sure the focus is to share information rather than to get new ideas.

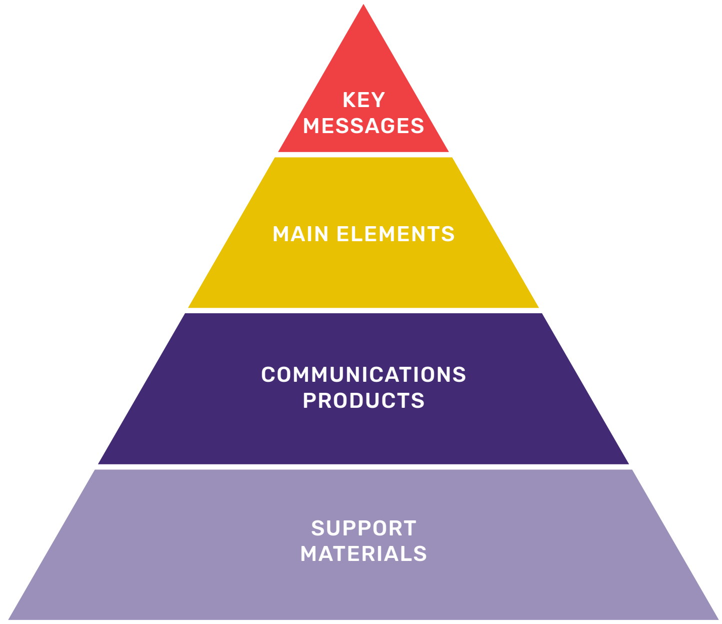

Figure 3 | *The product pyramid helps organize your message.* *Adapted from* (Aboriginal Affairs and Northern Development Canada / Indigenous Services Canada. "Product Pyramid" Digital image. *Aboriginal Affairs and Northern Development Canada*. 2015. Accessed October 21, 2016. http://www.aadnc-aandc.gc.ca/DAM/DAM-INTER-BC/STAGING/texte-text/fnct_e_1100100021861_eng.pdf. p. 26.) *Used with permission.*

Choose a method that worked well in the past. Communications Plans also provide some key points for how the messages should be communicated:[10]

- Simple, clear, and interesting.
- Easy to read and understand.
- Positive, truthful, and accurate.
- Focused on a specific challenge.
- Focused for a specific audience

When Should a Community Plan be Shared?

Communication should be consistent when creating and implementing the Community Plan.[11] The Community Plan should be shared with community members as soon as possible after it is finished. This will build trust and maintain high levels of community engagement.[12] The flow of information created by communication efforts is important to empower community members and keep them up to date with the implementation of the Community Plan.[13]

> "Planning is a continuous process – it never really ends."[16]
>
> – Unknown, Cook 2009, p.1

Further Reading

Gaining Momentum: Sharing 96 Best Practices of First Nations Comprehensive Community Planning

This toolkit provides well organized, easily understandable outlines for best practices in First Nations Comprehensive Community Planning. The 96 best practices are categorized depending on which stage of Comprehensive Community Planning they fit into. Each best practice is listed in simple manner that outlines what the best practice is, how to apply it, its benefits, and implications for future action.

http://www.newrelationshiptrust.ca/downloads/comprehensive-community-planning-long-version.pdf

First Nations Communications Toolkit by Aboriginal and Northern Affairs Canada

The First Nations Communications Toolkit was developed by Aboriginal and Northern Affairs Canada (now Indigenous and Northern Affairs Canada). The Communications Planning section could be paired with this fact sheet to assist with message development and selecting a tactic for dissemination.

http://www.aadnc-aandc.gc.ca/eng/1100100021860/1100100021862

Endnotes

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2 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, Accessed October 20, 2016, https://www.aadnc-aandc.gc.ca/eng/1377629855838/1377632394645#pre, p.3.

3 Pikangikum First Nation, "Working it out together: Pikangikum First Nation's Community Health Needs Assessment," *Beringia Community Planning Inc.*, 2013, Accessed October 24, 2016, https://www.cip-icu.ca/Files/Awards/Planning-Excellence/Working-it-out-together-Pikangikum- First-Nation-en.aspx.

4 Aboriginal Affairs and Northern Development Canada, 2010.

5 Centre for Indigenous Environmental Resources, "Communications Strategy Template," *Centre for Indigenous Environmental Resources*, 2008, Accessed October 24, 2016, http://www.yourcier.org/uploads/2/5/6/1/25611440/ccp_training_session_3_-_communication_strategy_template.pdf.

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8 Aboriginal Affairs and Northern Development Canada, 2015.

9 Aboriginal Affairs and Northern Development Canada, 2015.

10 Aboriginal Affairs and Northern Development Canada, 2010.

11 Aboriginal Affairs and Northern Development Canada, 2010.

12 Cook, 2009.

13 Cook, 2009, p. 73.

14 Cook, 2009, p. 97.

15 Cook, 2009, p. 31.

16 Javier Mignone, Wanda PhIlips-Beck and Darrell Phillips, "Moving Towards a Stronger Future: An Aboriginal Resource Guide for Community Development," *Public Safety Canada*, 2015, Accessed October 23, 2016, https://www.publicsafety.gc.ca/cnt/rsrcs/pblctns/mvng-twrd-strngr-ftr/mvng-twrd-strngr-ftr-en.pdf, p. 1.

USING VIDEOS FOR PLAN IMPLEMENTATION

by Angie Mojica
Indigenous Planning Studio
January 2020

Summary

This fact sheet looks at how videos can be used during plan implementation. The fact sheet goes over the benefits of using videos. There are tips on how to make good videos and where they can be posted. There are different examples of videos created by First Nations. The fact sheet ends by talking about some challenges and things to consider when making videos.

Keywords: community engagement, communication tools, reporting back, oral tradition

Why Use Social Media and Videos?

You've completed your pre-planning phase. Your Community Plan has been approved. What's next? It's time to start implementing your Community Plan!

Part of implementation involves keeping your community members living on-reserve and off-reserve up-to-date on the plan's progress. Implementation also involves educating your community about the plan's purpose and policies. Community members might not read the full plan because of how long it is. Your plan might also have concepts or processes that are new to your community. It is important to find creative ways of communicating that are both informative and engaging for your community.[1]

> *Part of plan implementation involves keeping your community members up-to-date and educating them about the plan's purpose and policies.*

More and more people are using social media as a digital communications tool, especially youth. Examples of social media websites are Facebook, Instagram, YouTube, and Twitter. These websites are free to use and can be easily accessed on a mobile device or computer with internet.

For more information on community engagement, see the *Engaging Your Community* and *Engaging Youth* fact sheets.

Some First Nations use social media to share updates with their community. Unlike e-mails and printed newsletters, your social media account groups all shared updates together. Photos and written messages are often used to provide updates. Sharing videos through social media is another creative way to engage and inform your members.

Figure 1 **|** *Woman being recorded by a video camera.*
Source (CoWomen, "Black Video Camera," *Pexel*. February 16, 2019. Accessed January 21, 2020. https://www.pexels.com/photo/black-video-camera-2041396/)

What Are the Benefits of Using Video?

1 Is More Enjoyable

Using videos enhances how you share information with your community. Watching videos, pictures, songs, and voiceover can be more interesting to look at than reading a long plan. Showing clips from a meeting can be easier to understand than formal minutes. Videos are engaging since people like seeing themselves, their friends and family, and familiar places in videos. Videos aren't meant to replace other forms of communication. Videos can supplement and provide other ways to understand.

Videos are also a lot more accessible for those who can't read. For example, you can record someone doing a presentation instead of just sharing their PowerPoint slides.

You can also record people in your community speaking in the language they feel comfortable with. Subtitles can be added afterwards if needed.

2 Creates a Historical Record

Some things can't be recorded easily through writing: the notes of a song, the steps to a dance, the sound of someone's voice. The videos eventually become a historical record that your community can look back on and watch over again. Over time, the videos can also be used to track progress during the monitoring phase of planning.

3 Provides an Opportunity to Involve Youth

The youth in your community might be more familiar with the technology needed to record videos. Involving youth to help make videos can build capacity in your community. Training youth to create videos teaches them skills like video production, teamwork, and interviewing and communications skills.[2]

Youth can also use these video skills beyond assisting your community's plan implementation. Videos can empower youth to record their experiences through digital storytelling. Creating videos can help connect Indigenous students with their language, culture, traditions, and land.[3]

Creating videos can empower Indigenous youth by helping them connect with their language, culture, traditions, and land.

4 Engages Off-Reserve Members

Sharing videos on social media is a great way to keep members living off-reserve engaged with the community. Meetings and presentations can be recorded and shared with members who weren't able to attend. Their feedback can be collected through the comments on the videos. You can also get them to e-mail you their feedback or provide a link to an online survey.

Table 1 | Maximum video length and file size, and the pros and cons of the most common social media websites.
Maximum video time and file size adapted from (York, A. "Always Up-to-Date Guide to Social Media Video Specs." SproutSocial. September 13, 2019. Accessed November 19, 2019. https://sproutsocial.com/insights/social-media-video specs-guide/.)

	Maximum Video Time	Maximum File Size	Pros	Cons
Instagram	60 seconds	4 GB	• Unlimited followers on private accounts • Great for posting quick, on-the-go updates	• Short maximum video time • Optimized for cell phones, can't make new posts on a computer
Twitter	140 seconds	512 MB	• Can link with other social media accounts so content posts automatically	• Small maximum file size resulting in poor image quality, but you can post links to content on other social media
Facebook	120 minutes	4 GB	• Easier to avoid anonymous commenters by inviting members and posting content to a private group	• Members must create a Facebook account to access content posted
YouTube	12 hours	128 GB	• Post longer, higher quality videos • Can stream meetings in real time • Organize related videos in playlists	• Harder to manage privacy settings • Privacy settings individually managed for each video

What Makes a Good Video?

Good videos have 4 main features:[4]

Takeaway Message

What are you trying to tell your viewer? Try to stick to one topic per video. You can make many short videos if needed.

Significance

Why is this topic important for your viewer to understand? Talk about why your viewer should watch the video right at the beginning.

Structure

Structure is the order of the information that's in the video. Like a story, videos should have a clear beginning, middle and end. Before recording or editing a video, make a script or outline for yourself to follow. Having a clear structure makes it easier for your viewer to follow and absorb information.

Imagery

Imagery like pictures, video clips, and animations can make the video more interesting to watch. Imagery can also help your viewer understand the content and connect with the video more.

What Are Some Types of Videos?

Purpose: To Educate or To Update?

Videos are useful at any stage of the planning process from pre-planning to monitoring. There are two main uses for sharing videos during plan implementation. Instructional videos can be used to teach your community about your plan and its policies. Videos can also be used to share your plan's progress.

There are many ways to make instructional videos. One example is to record a presentation. Another example is to use more of a storytelling approach and include interviews with community members.

Update videos can either be more formal or more candid. One example is to upload video recorded meetings for people who couldn't attend. Another example is to record someone sitting in front of a camera provide a short verbal update.

Update Video Example

Chief Corrina Leween of Cheslatta Carrier First Nation providing an update on the Nation's draft Community Plan. The video was uploaded directly from a community meeting. This is also an example of an unedited video.

https://www.youtube.com/watch?v=kXMG6N9hiz4

Instructional Video Example

Linda Trudeau, Community Comprehensive Plan Coordinator (CCP) for Moose Cree First Nation, presenting information on CCPs. This example uses a combination of presentation slides and video recordings.

https://www.youtube.com/watch?v=MAHYgJ4C3Yo

Edited or Unedited?

Unedited videos are recorded and then directly posted onto a social media site. These are great for quick updates or announcements. Longer unedited videos can be uninteresting to watch.

Edited videos usually have a combination of video clips, images, audio, and text within them. Edited videos require you to use a separate program before sharing on a social media website. This type of video can be more entertaining to watch. Edited videos also take more time to create.

Edited Video Example

Sq'ewá:lxw First Nation summarizes what happened during its last CPP meeting. This example displays video and pictures from the meeting while a narrator provides information. Music is playing in the background. This example is also an update video.

https://www.youtube.com/watch?v=TXpPG5Zley4

Edited Video Example

Members of Squamish Nation discuss their Nation's land related issues. This video has very little editing compared to the previous example. Video recordings of interviews are edited together to tell a single message.

https://www.youtube.com/watch?v=8-DBgpfSulM

Long or Short?

Videos can range between 20 seconds and 20 minutes. Think about your video's purpose and intended audience. Complicated topics may need longer videos. People are more likely to watch a video if it's less than 6 to 9 minutes long.[5]

Who Is Involved in the Video-Making Process?

Many people can be involved in the video-making process depending on the video's topic and purpose.

Your Lands Manager can make videos about the planning process and other planning-related topics. Chief and Council can record video update or meetings. The youth, Elders, and other community members can also be involved in the video-making process. Having community members involved in the process can help make sure that the content you are producing is relevant and engaging to them.

Members living on-reserve and living off-reserve become connected through the social media platforms. Livestreams allow you to broadcast a video as a meeting is happening.[6] People watching it can also provide comments in real time. Even if someone can't attend a meeting, they can still be present and participate.

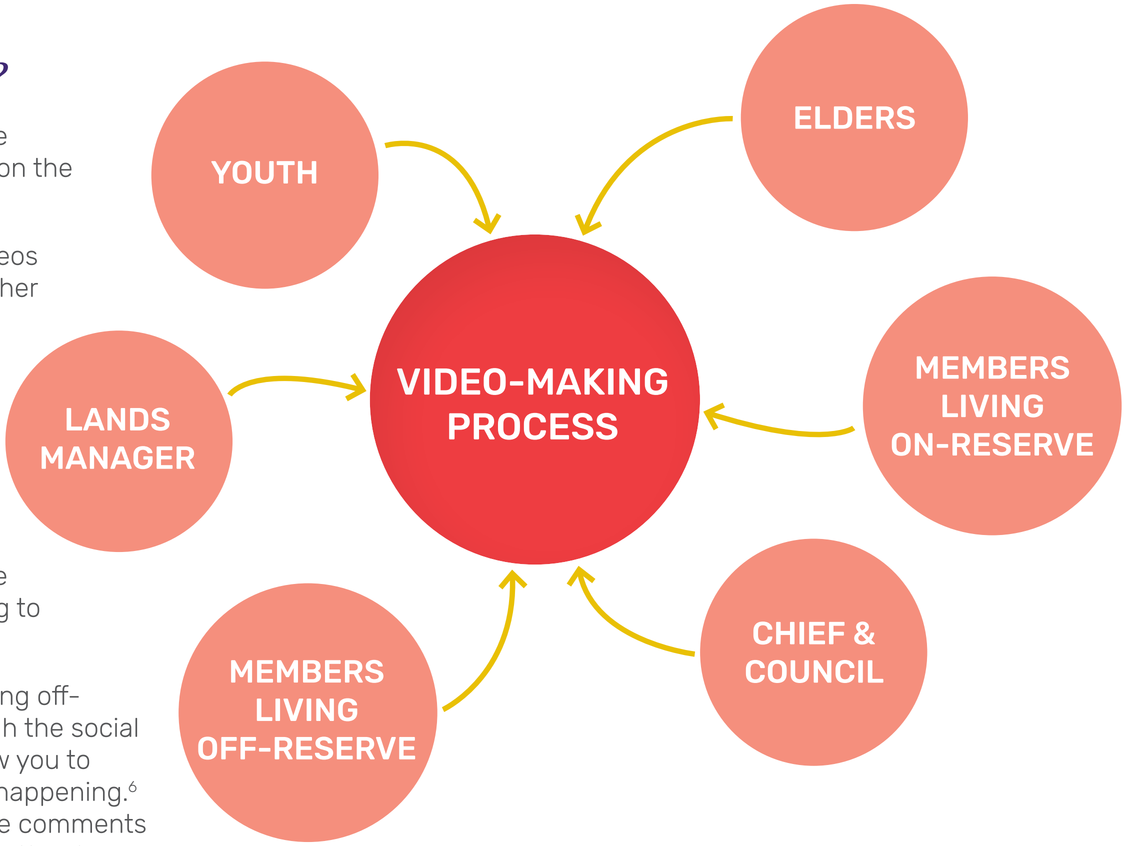

Figure 2 | Many members are connected by the video-making process.

What Are Some Challenges?

1 Access

You need good internet access to share and view videos on social media sites. Slow internet access can lower your community's ability to share and view videos on social media. You also need to have access to a mobile device or computer to be able to share and see the videos.

You can improve access by storing videos on a device that everyone in your community can use. This device can be located at the band office, school, community centre, or any other public facility.

2 Privacy

The videos you share online may be seen by anyone who is using the internet. You can restrict public access by changing your social media account's privacy settings (see further reading). Even if you limit access to your social media account, you should still think about what information you choose to share online.

People who view the video can also leave comments. This comment section needs to be monitored on an everyday basis. You can delete offensive or inappropriate comments. However, it's still important to respond to negative or opinionated comments in a constructive, positive way. These comments are still a form of valuable feedback![7]

3 Time and Resources

Certain types of videos like instructional videos can take a lot of time to plan, record, and edit. Try not to stress out about making things perfect! You can keep things simple by sticking to unedited videos.

It can take some time to build skills on recording and editing videos. But, you don't need to get expensive equipment or software. Any camera or phone that records video is okay. Most computers come with a free video editing software. There are also programs available for free online.[8]

Managing social media accounts and monitoring the comments section can take up a lot of time. You might need to have one person who only focuses on digital communications.

Final Thoughts

Videos can be a creative way to engage and share information with your community during plan implementation. Even though it can take some time to learn video editing, you don't need a lot of money to get started. When used together with social media, you can stay connected with members who live off-reserve. By involving youth, you can empower them with a new skill and give them a bigger role in the community.

Further Reading

How to Manage Your Social Media Privacy Settings by The University of Texas at Austin: Center for Identity

Additonal information on different social media privacy settings. This resource covers the settings on social media sites discussed in this Fact Sheet: Facebook, Twitter, and Instagram. Settings for other social media websites (SnapChat, LinkedIn, and Pinterest) are also discussed.

https://identity.utexas.edu/everyone/how-to-manage-your-social-media-privacy-settings

Beginner's Guide to Editing Videos by BorrowLenses

An overview of how to edit videos for beginners. Includes information on how to get started, computer requirements, and choosing a video editing software. General tips and a step-by-step guide on starting a video editing project are also included.

https://www.borrowlenses.com/blog/how-to-edit-video-for-beginners/

The Ultimate Guide to Easily Make Instructional Videos by TechSmith

An in-depth look at creating instructional videos. Provides additonal information and tips on creating videos in general. The TechSmith Blog website is also a good resources for information on other visual media content.

https://www.techsmith.com/blog/instructional-videos/

Endnotes

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MONITORING YOUR PROGRESS

by Christopher Gibson
Indigenous Planning Studio
January 2020

Summary

This fact sheet is an overview of the monitoring and evaluation process. It outlines why you need to monitor and evaluate community plans, what is the purpose of monitoring and evaluation, who is involved and how it benefits your planning projects and helps you achieve your community's goals.

Keywords: community engagement, reporting back, collecting data, analyzing data, managing the process

What is Monitoring and Evaluation?

Monitoring and evalution is a process that helps track and assess the implementation and results of your community's planning projects and decisions, by gathering data and information to evaluate their effectiveness.

Monitoring is the fourth stage in the planning cycle. This step is not the end of the process because planning is a continuous cycle. The results of your monitoring and evaluation will inform changes to your plan and how it will be implemented.

Monitoring is integral to evaluation. During an evaluation, information from previous monitoring processes is used to understand the ways in which the project or program developed and stimulated change.

Why Monitor and Evaluate Your Projects?

Some key reasons are to demonstrate the project's outputs or successes to the community and partners, and to provide data towards the overall understanding of the benefits of your project. It also allows for an **adaptive management approach** to current and future planning projects.

> ### *Adaptive Management Approach*
>
> The process of exploring alternate ways to meet the objectives based on your project's assessment and reporting.

Monitoring and evaluation plays a key role in the long-term success of planning. It can demonstrate what is going right, what is going wrong, and what needs to be improved. It can also demonstrate your past successful projects and encourage confidence in the planning team's ability to deliver future successful projects.

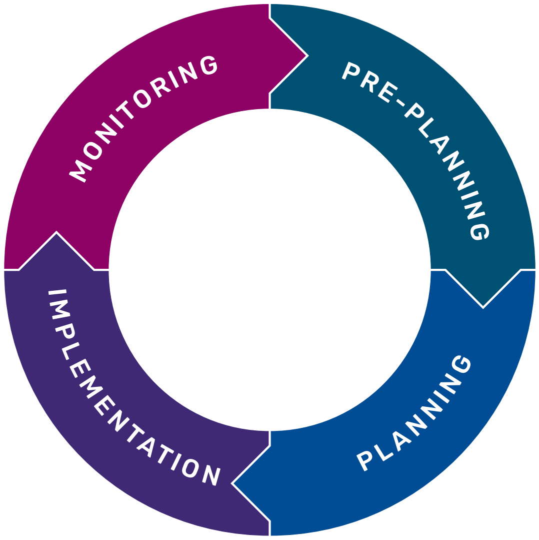

***Figure 1** | The planning cycle.*
Adapted from (Indigenous and Northern Affairs Canada / Indigenous Services Canada. "CCP Handbook: Comprehensive Community Planning for First Nations in British Columbia, Third Edition." 2013. Accessed November 17, 2019, http://www.aadnc-aandc.gc.ca/DAM/DAM-INTER-BC/STAGING/texte-text/ccphb2013_1378922610124_eng.pdf. p. 14.) *Used with permission.*

Monitoring

A periodically recurring process that begins during the planning stage of a project or program. Monitoring allows results, procedures and experiences to be documented and used as a basis to guide decision-making and processes. Monitoring checks the progress against plans. The information learned through monitoring is used for evaluation.[1]

Evaluation

A process that assesses, as objectively as possible, how well a completed project or program (or a completed phase of an ongoing project or program) is achieving the community's plan. The results from an evaluation inform strategic decisions, improving the project or program in the future.[2]

What Are the Steps in Monitoring and Evaluation?

1 Develop a Monitoring and Evaluation Plan

A monitoring and evaluation plan should be part of the initial project planning. When setting your vision, goals and action plan, factor in when you want to check-in on the progress and consider how long this will take. Having this established beforehand will hold everyone accountable to the success of the project.

2 Monitoring

Monitoring can be completed at set intervals, such as weekly, monthly, quarterly, etc. This should be outlined and scheduled within the plan and the frequency should be determined by the length of the implementation. All monitoring should be documented as this will inform the evaluation process.

3 Evaluation

Evaluation takes place at the completion of the project or program, or a project phase. This should be outlined and scheduled within the plan. Evaluation frequency should be determined by whether there is an end date or the project or program is ongoing.

At the end of the project, conduct a rigorous analysis of how well the objectives and activities went and if your goals have been met.[3]

4 Report Results to Community and Stakeholders

When your evaluation is finished, a report is completed, and you can share the lessons learned with the community and other stakeholders.

5 Make Changes and Learn Lessons

The next step is to address any changes needed to the existing plan, and consider how the results can inform other ongoing or new projects or programs.[4]

***Table 1** | Comparison Chart.*
Adapted from (Surbhi, S. "Difference Between Monitoring and Evaluation." *Key Differences*. 2017. Accessed January 8, 2020, https://keydifferences.com/difference-between-monitoring-and-evaluation.html)

	Monitoring	Evaluating
Meaning	A routine examination of the activities and processes of a community plan during the implementation phase	A process used to analyze the effectiveness of a project at its completion or at the end of a project phase
Related to	Observation	Judgement
Occurs at	Operational Level	Management Level
Process	Short term and Continuous	Long term and Periodically
Focuses on	Improving efficiency	Improving effectiveness
Completed by	Internal staff, Lands Manager, Chief and Council	Internal management, Lands Manager, Chief and Council, Independent committee

Reasons for Monitoring and Evaluation:

- Make sure your projects are benefiting the community.
- Assess the implementation of a comprehensive community plan.
- Make needed revisions and modifications so your goals and objectives remain relevant and current.
- Inform and excite your community about project results.[5]

Examples of Tools to Keep Projects on Track

1. ***Establishing a baseline:*** The information and data gathered prior to the implementation stage of a project. It is important to gather this information, it can be used for comparison in assessing the program's effectiveness.[7]
2. ***Key performance indicators (KPIs):*** A measurement tool that can help determine if your community's planning decisions are achieving the key objectives.
3. ***Logic models:*** Charts that can help you visualize your planning project. A logic model identifies inputs, audience, activities, outcomes and impacts.
4. ***SWOT analysis (Strength, Weakness, Opportunity, and Threats):*** Can be used to evaluate a community plan or project by identifying the strengths, weaknesses, opportunities and threats.

What Are You Monitoring?

Monitoring should focus on demonstrating if the project or program inputs and outputs have been achieved.[6] If things are not going according to plan, monitoring can help project or program staff identify and solve problems quickly.

What Are You Evaluating?

Evaluation should focus on how well the objectives were achieved. An evaluation asks whether a project or program has achieved what it set out to do, and if it is making a difference.

Some questions you can ask are:

- Were there any problems or setbacks during the implementation process?
- What parts of the project went well, and can these strategies be used in other projects?
- Did anything from the plan change over time?
- Are the results what was planned?
- Is the project delivering what it had intended to?

For more information on monitoring and evaluation tools, see the *Understanding KPIs*, *Using Logic Models for Program Evaluation*, and *SWOT Analysis* fact sheets.

Figure 2 | *Groups of people to include in the process.*

Who Should Be Involved in the Process?

Feedback is a major component of evaluating a community plan. Everyone in the community plays a part when reviewing projects. It is important to make sure that voices are heard when things need improving and when there is praise for its success.

Members of the planning team, the Lands Manager, and community members living on- and off-reserve should be involved in the process. This may also include students, Elders, band administration, teachers, and Chief and Council.

Who Will Conduct the Monitoring and Evaluation Process?

Monitoring is regularly carried out by project or program staff, management and the Lands Manager as they are closer to the project and can be on hand to observe the stages.

An evaluation committee can be formed during the planning stage. The committee can be the project staff and management, the Lands Manager, Chief and Council, an external agency, or any combination of the four. External agencies can provide the technical knowhow and are independent to the project. However, using your project staff will build their own knowledge capacity and sense of ownership over the results.

Keeping the community involved will help encourage support and foster their investment in the plan's outcomes.[8]

Engaging the Community

Community members should participate in monitoring and evaluation of work plans. They can provide comments and constructive criticism. Engaging the community will ensure that community members voices are heard, and they can help determine if the project continues to align with community goals and needs.

Some ways to engage the community and encourage participation are:

- Community meetings
- Home visits
- Focus groups
- Open houses
- Surveys
- Newsletters
- Website
- Social media (ex: Facebook)[9]

For more information on community participation and engagement, see the *Engaging Your Community* and *Using Videos for Plan Implementation* fact sheets.

When Should You Monitor and Evaluate?

Depending on the length of time of your project, monitoring and evaluating can be done at milestones during the implementation process or on an annual basis. The implementation committee should create reports on the monitoring and evaluation findings for council, administration and the entire community.[10] This will help keep the project on track and identify if there is a need to update stakeholders or for seek additional funding or supports.

How to Know When

The size and scale of the project will determine when you will conduct your monitoring and evaluation. The monitoring and evaluation process should be included in your project's schedule with a date and should be assigned to a person or department.

Example

If your project will take a year from start to finish, an appropriate time to monitor could be at the fourth and eighth month with the evaluation taking place at the twelfth month.

Determining Your Capacity

Your community may not have the capacity to monitor all projects. It is important to prioritize what projects will get monitored. Monitoring will take time and resources so you will want to determine what projects you want to assess; over what time period; and if the ongoing project needs monitoring or an evaluation at the end of the project.

What are some types of evaluation?

1 Implementation

A process of tracking and documenting the implementation of a plan decision. Your report will describe the actions that were proposed and undertaken to implement the project. The report should document actions that were completed and what is still needed to continue the implementation of the project.

2 Effectiveness

You can collect data to determine if the desired outcomes of the implemented project are being met. This requires the development of indicators of changes, thresholds, and time frames.

3 Plan Evaluation

Review of the planning decision and preparation of a monitoring report. This report will determine if your plan decision(s) are still relevant and useful. The evaluation report should be done approximately every five years.[11]

Final Thoughts

Successful planning needs to be responsive to change. Your planning decisions should be framed in a way to allow your improvements. With new technology or new information, planning decisions may need to be adjusted to incorporate changes.

Monitoring and evaluating your planning decisions is a continuous cycle.

Monitoring and evaluating your planning decisions is a continuous cycle. It will help you assess the progress and measure the effectiveness of the plan, and it supports formal plan review and renewal.

Further Reading

Evaluating Indigenous Programs: A Toolkit for Change by Sara Hudson

This is an in-depth report on program evaluation from an Australian Indigenous perspective. It calls for evaluation programs rooted in Indigenous values, and advice to keep up-to-date with research about good evaluation techniques.

https://www.cis.org.au/app/uploads/2017/06/rr28.pdf

Monitoring and Evaluation for Sustainable Communities by School of Geography and the Environment

This is a step-by-step guide to understanding monitoring and evaluation processes. It is a resource on climate change and energy written for community led projects. This resource is informative on the who, what, where and when aspects of monitoring and evaluating small to large projects.

https://www.geog.ox.ac.uk/research/technologies/projects/mesc/guide-to-monitoring-and-evaluation-v1-march2014.pdf

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ESTABLISHING BASELINES

by Samantha Blatz
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April 2019

Summary

This fact sheet explains how to establish a set of baseline data to use as an evaluation tool. Baseline data is an important part of evaluation as it gives you a 'before picture' of what you are measuring.

Keywords: collecting data, managing/storing data

What Is a Baseline?

An important part of any plan or program is the process of evaluating your progress. Through evaluation, you are able to judge whether your plan has been a success or not.[1]

Evaluation is often thought of as the last step in the process. However, it is important to think about evaluation from the start in order to conduct one properly.[2]

A key part of the evaluation process is gathering baseline data.[3] The baseline data will let you make before and after comparisons. Unlike data that is gathered to measure the success of your plan, baseline data is gathered before the plan has been implemented. Gathering the data at the beginning of the project allows you to compare any future data to the baseline data.[4] Making these comparisons allows you to see how the plan has helped to change things in your community.

The baseline data will give you a 'before picture' of your community to compare with after plan implementation.

Why Is Establishing a Baseline Important?

It is important to evaluate your plan regularly to know whether it needs to be updated.[6] Establishing a baseline is the first step to evaluate whether your community plan has been successful or not.[5]

The baseline data helps you begin to measure how your plan is able to help you achieve goals. The baseline data will give you a 'before picture' of your community to compare with after plan implementation. Without this data, it is difficult to measure the changes that occur after your plan is implemented.

Example

One of the goals of Community ABC's plan is to protect community water supplies so that the quality or quantity of potable water is not compromised.

To measure how effective the plan is, you would want to take samples of the water. It would be important to take water samples from a variety of locations and to make sure each one to clearly label.

The quality of the water samples would then be tested onsite or sent to a laboratory. You would need to gather samples for testing at regular intervals (e.g., once a year, or possibly once a season). You will be able to see how the water quality has changed over time by comparing the new water samples to the first water samples you collected.

In this example, the baseline data would be the first water samples that were gathered.

What Is Evaluation and Why Is it Important?

There are four processes involved with land use planning. These are pre-planning, planning, implementation, and evaluation.[7] Each of these processes should be applied when creating a community or land use plan. As you can see in Figure 1, the manner of moving through these processes is a cycle and continues to circle back to the beginning.[8] The cyclical nature of the planning process is important because it ensures that the feedback that is gathered is being incorporated into the plan at each step along the way.[9]

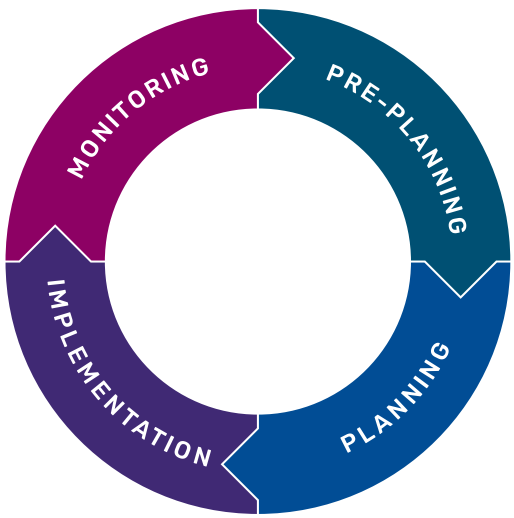

Figure 1 | *Diagram of the planning process.*
Adapted from (Indigenous and Northern Affairs Canada / Indigenous Services Canada. "CCP Handbook: Comprehensive Community Planning for First Nations in British Columbia, Third Edition." 2013. Accessed October 24, 2016, http://www.aadnc-aandc.gc.ca/DAM/DAM-INTER-BC/STAGING/texte-text/ccphb2013_1378922610124_eng.pdf. p. 14.) Used with permission.

The process of evaluating a plan consists mainly of gathering data to determine whether your plan is accomplishing what you intended it to accomplish. It is often assumed that this step is something that comes after you have created and implemented your plan. However, the evaluation process should be started as soon as you begin creating your community or land use plan.[10]

One way to do this is to establish early on what your process for evaluation is going to be. This includes determining what the goals of the plan are and how you are going to measure your success when considering those specific goals.[11]

For more information on evaluation and measuring your success, see the *Monitoring Your Progress, Setting Goals and Objectives,* and *Using Logic Models for Program Evaluation* fact sheets.

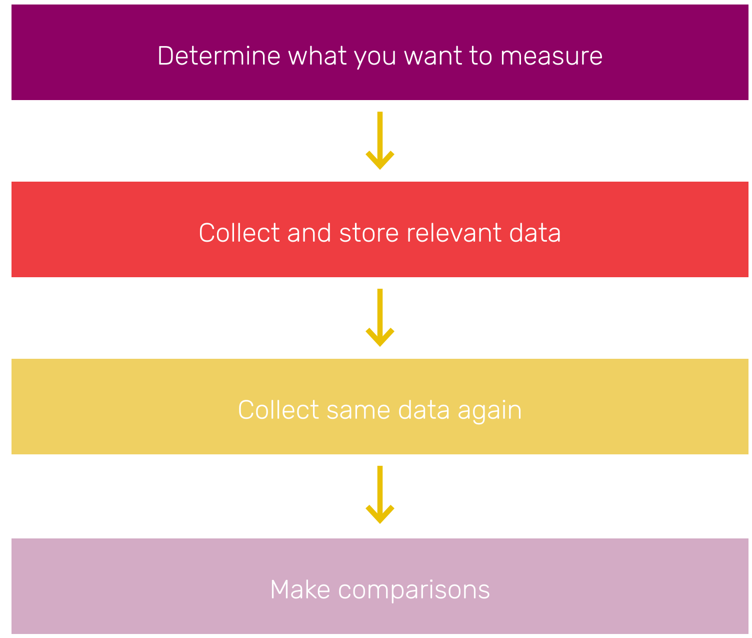

Figure 2 | *This diagram outlines the steps that you can follow when establishing baseline data.*

How Do You Establish a Baseline?

To establish a baseline you must first determine how you will measure the different parts of your plan.[12] For example, if one part of your plan is focused on housing, you might want to measure how many new houses are completed within a 5-year period. The baseline data for this measurement would be how many houses are present in the community before the plan is implemented.

Part of creating a baseline is collecting, organizing, and storing information that can be used later when you are collecting new data. It is important that the data you collect to establish your baseline is gathered in the same way that data will be gathered after the plan is in place.

Who collects the baseline data depends on what sort of data you are searching for. Some technical data, such as water or soil quality, will need to be gathered by experts. However, there is a lot of data that you can gather on your own. This data includes such things as surveying members on a variety of issues, counts of housing stock and repair, as well as number of students who are registered or graduating each year.

Baseline data often includes things that you can count or measure, such as the number of houses or size in metres.[13] However, it can also include opinions and attitudes. For example, you might want to know how members feel about the community before and after your community plan is implemented. One way to find this information would be to give members a survey that asks their opinions on different aspects of the community. This would be the baseline data.

You can then give the same survey again a few years after the plan has been implemented to see if members' feelings about the community have changed. It is important to know this information as you will need community buy-in when implementing your new community plan. By comparing the new survey results to the baseline data, you will know if there are any parts of the plan that the community members do not support.

Process/Example

1 Quantitative

Community XYZ is writing their community plan. They have gathered feedback from the community members who have stated that one of their goals is to protect the natural resources on their reserve lands and traditional territories.

One of the first steps toward this goal would be to have an accurate understanding of the current state of the natural resources in the area. To do this, the community uses drone technology and land survey techniques to create a map of the various natural resources on their land. The data collected through these methods, as well as the maps, are the baseline data that all future data will be compared to.

When new data is collected, it is important that it is collected in the same way as the baseline data so that an accurate comparison can be made.

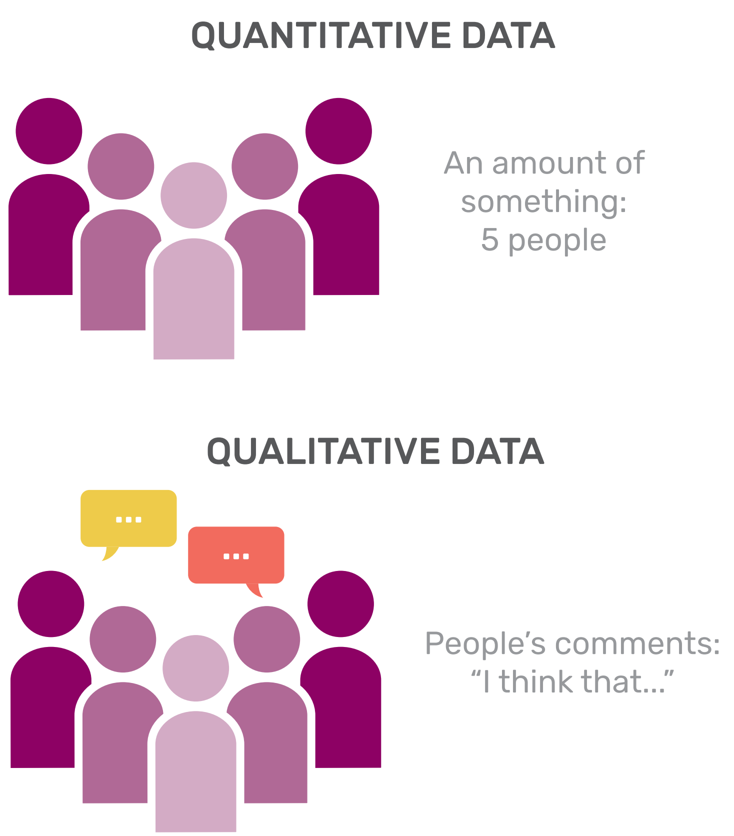

Figure 3 | Example of quantitative data compared to qualitative data.

Examples of Baseline Data to Collect

Health + Wellness
- # of members treated in the community
- State of repair of health facilities
- # of members served by wellness programs
- Are members satisfied with service?

Education
- # of students registered in each school year
- # of graduates each year
- State of repair of educational facilities

Economic Development
- # of businesses in the community
- Revenue from businesses
- # of members employed
- Average income levels

Culture + Language
- # of people who speak the local language
- # of programs offering language training
- # of programs offering cultural opportunities

Housing
- # of members living in the community
- # of residences in need of repair
- # of members in need of housing

Environment
- Level of pollutants in the water or soil
- # of days per year with boil water advisory

2 Qualitative

Community XYZ members have identified that one of the goals of their community plan is to offer more effective healthcare programming. It is possible to measure this goal using quantitative data. An example of quantative data is the number of members served by a program. Another example of quantitative data is the amount of money invested in the programming.

However, it is also helpful to have qualitative data. An example of qualitative data is feedback from members regarding what they think about the effectiveness of the healthcare programming. This type of data focuses on what people think and feel about the programming that is offered.

Qualitative data like this can be collected through workshops, town hall meetings, or surveys. Depending on how you gather the information, it can be recorded using scales, graphs, or by grouping quotes from members into themes.

Whichever method you choose, you should use the same method when you go back to collect data again after the plan has been implemented.

Final Thoughts

Evaluation of a community or land use plan is an essential part of the planning process. To ensure that the evaluation is effective, it is important to set up a system for evaluation when you first begin to create your plan.

Part of this system is collecting baseline data, which you can use later for comparisons. This baseline data allows you to judge whether you plan has been successful at achieving the goals it is intended to achieve.

Further Reading

BC First Nations Land Use Planning Effective Practices: A guide prepared for the New Relationship Trust
by Ecotrust Canada

This guide gives an overview of each of the four planning stages and the various steps necessary to complete each stage. The solutions given are specific to the First Nations planning context. http://www.newrelationshiptrust.ca/wp-content/uploads/2017/04/land-use-planning-report.pdf

Gaining Momentum: Sharing 96 Best Practices of First Nations Comprehensive Community Planning
by Jeff Cook

The 96 best practices shared in the guide follow the four planning stages and offer solutions used by First Nations from across Canada. http://www.newrelationshiptrust.ca/wp-content/uploads/2017/04/comprehensive-community-planning-long-version.pdf

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UNDERSTANDING KPIS

by Felipe Mogollón
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April 2019

Summary

This fact sheet explains what key performance indicators (KPIs) are, how they are used, and why they are helpful for evaluating any community planning process. The final goal of this guide is to provide a general understanding of this project management tool and its application in an Indigenous planning context.

Keywords: reporting back, managing the process

What are Key Performance Indicators?

Key performance indicators (KPIs) are a measurement tool that was established by the Project Management Institute (PMI), to determine how effectively a company or organization is achieving a key objective.

This tool can be used in planning work to evaluate a process by engaging the community in the planning process. The community plays an important role in setting and checking KPIs, as they can incorporate traditional knowledge to evaluate planning endeavours such as a Comprehensive Community Plan or Land Use Plan process.

By setting achievable and measurable KPIs, the entire community will be able to track and evaluate the planning process. Additionally, the community will be able to push for improvements in the planning process.

KPIs offer the opportunity for Indigenous communities to be the guardians of any planning process they are working on, as they can track, evaluate and change any aspect of the planning process. By setting clear KPIs, your community will be able to identify problems or delays in any particular aspect of the planning process[1].

Figure 1 **|** *Key Performance Indicators KPIs.*
Source: Parmenter, David. "Key Performance Indicators Developing Implementing and Using Winning KPIs." 2015.

Key Performance Indicators

A measurable value that shows how effectively a community is achieving key planning objectives.

Why Should a Community Create KPIs?

Any new journey is difficult to start, understand, evaluate and achieve. The same can be said for planning, as it has can require professional expertise and funding, and usually has time restrictions. These factors can make achieving your final goals difficult. Keep in mind that all planning processes open a door for communities to achieve self-determination and self-governance. This can create investment and new opportunities for current and future generations.

Figure 2 **|** *Planning Process & KPIs*
Source: Created by Mogollon, Felipe. "Planning Process & KPIs." 2019.

The purpose of using KPIs is to provide meaningful answers about work progress over a set period. Communities must identify the projects and goals that are most meaningful to them[2]. KPIs are a tool that can help communities identify and measure their priorities, keeping the planning process on track. KPIs will indicate how well the planning process is going and what has been achieved.

> *Communities can use key performance indicators during the planning process to evaluate their success at reaching targets.*

KPIs are an evaluation tool that will empower the community in the planning process. KPIs act as guardians between members of the community and the planning team[3]. Through KPIs, the community will evaluate and provide new ideas that will enrich the planning process.

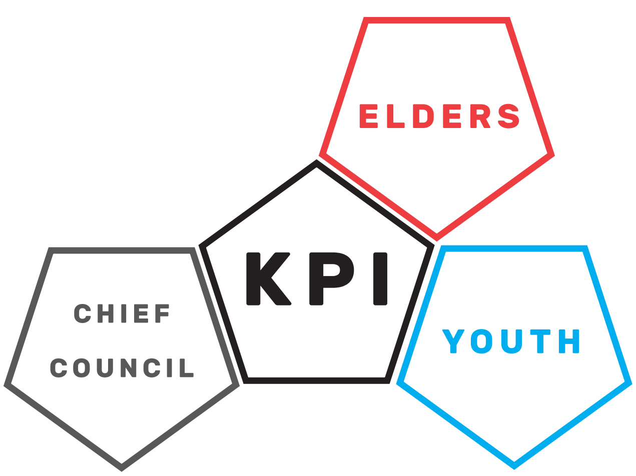

Figure 3 **|** *Who sets KPIs?*
Source: Created by Mogollon, Felipe. "KPI Stakeholders." 2019.

Who sets KPIs?

If the planning team wants to increase community involvement, their community could set the KPIs and monitor them. Chief and Council, Elders, and youth are also important actors, as they can be the facilitators to create and evaluate KPIs.

> *KPI is an excellent way to involve community members to create, control and follow up the planning process of their community.*

What Are Characteristics of KPIs?

In Figure 4, the common characteristics of KPIs are outlined. Keep these 7 characteristics in mind while creating KPIs KPIs are considered a form of communication. Therefore KPIs should be clear, direct, and expressed in few words.

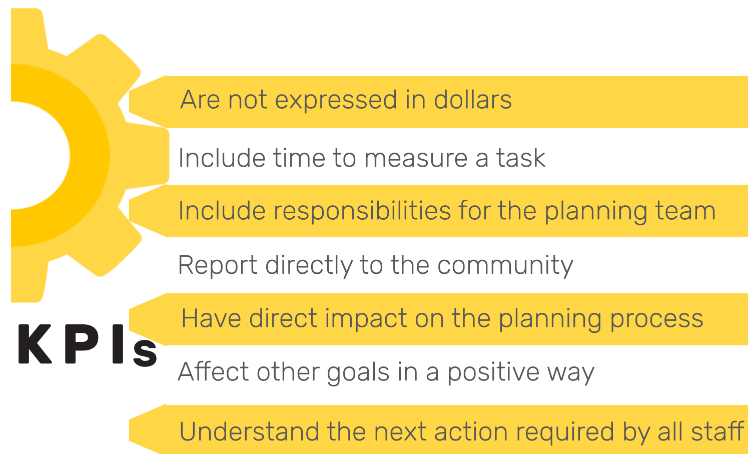

Figure 4 **|** *Characteristics of KPIs.*
Source Parmenter, David. "Key Performance Indicators Developing Implementing and Using WInning KPIs." 2015.

What Makes a KPI Effective?

To create effective KPIs the community should start with a basic understanding of what a planning process is, the people and resources that are needed, community objectives and traditions that should be included, and the time frame.

To answer some of these questions, the entire community could start a process that involves an open conversation about planning in the community. The process should be cyclical over time. Community members and Chief and Council must work together to create measurable KPIs that respond to community needs and keep the planning process on track.

> *To create effective KPIs the community should start with a basic undertanding of a what planning process is, and what involves.*

How to Create KPIs?

Keep in mind that KPIs exist to help you evaluate and achieve specific goals of the planning process. These four questions are here to help you organize your ideas to create measurable KPIs.

1 Where are we today?

2 Where will we end up?

3 Why is this process important?

4 How can we get there in a cost-effective and high-quality way?

By answering these four questions, the community will be able to realize the main goal of their project, evaluate where they are, and if necessary, make changes to achieve their goal.[4]

KPIs are a tool that can change and adapt over time. Figure 2 shows the four basic steps of any KPI.

1. Identify: The community identifies a possible KPI that could apply to the evaluation of the planning process.
2. Define: The community and the planning team agree to set a KPI on a goal that is measurable and achievable during a set period of time.
3. Work: The planning team works together with the community to achieve that goal.
4. Review: The community evaluates the goal while the planning team works on the planning process.

Figure 5 | Process of setting KPIs.
Source (Weaver, J. "What is a KPI Report & How do I create one?" KPI, November 7, 2018, https://www.clearpointstrategy.com/what-is-a-kpi-report-how-do-i-create-one. 2015.)

What Are KPIs in the Planning World?

Here are some examples of KPI topics that might be useful to consider as you create your own:

- Project team morale or performance
- Availability of the planning team
- Customer service of the planning team
- Time management of the planning team
- # of people that attended a community engagement meeting

What are KPIs in an Indigenous Context?

KPIs have been used by Indigenous communities and organizations in the past. Here are two examples:

Curve Lake First Nation found that KPIs are a good way to determine if a business is successful or not. They found that by setting clear and measurable KPIs, they were able to report and monitor business success. In fact, KPIs helped them to provide a clear report to stakeholders like Chief & Council, and the Economic Development Committee. Some of the metrics they used included net profit, number of units sold, profit margin, and number of customers.[5]

The **Aboriginal Tourism Association of Canada** (ATAC) established a five year plan with four KPIs pillars to measure their overall performance. These are Development, Marketing, Partnerships, and Leadership. This plan is designed to overcome barriers and maximize opportunities. This allows ATAC to achieve its targets and establish Aboriginal tourism as a distinctive segment of Canada's tourism industry[6].

Final Thoughts

The best KPIs allow a community to feel ownership over its planning process. KPIs encourage you to reflect on the past, present, and future of planning projects. You and your community can identify your biggest goals and break them down into manageable, measurable steps. You gain control over making your dreams into reality.

Further Reading

KPI For Dummies by Bernand Marr

This book is one of the most important resources for professionals in understanding KPIs. It has easy and engaging language, that shows how to create KPIs, what to do and what to avoid, and how to evaluate KPIs.

Key Performance Indicators: Developing Implementing and Using Winning KPIs by David Parmenter

This book provides many approaches to creating KPIs, and includes tools, checklists, and examples that help the reader to understand how KPIs help organizations to create metrics that measure their performance.

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USING LOGIC MODELS FOR PROGRAM EVALUATION

by Alexandra Caporale
Indigenous Planning Studio
April 2019

Summary

This fact sheet discusses what logic models are and how they can help you organize what you have done so far and evaluate whether you are meeting your goals.

Keywords: reporting back, managing the process, analyzing data, communication tools, direction setting

What Is Program Evaluation?

Program evaluation is an organized way to understand the impacts of plans after the plans have been set in motion. You compare your original goals, objectives, and strategies with what is happening now. You can learn about what worked and what needs improvement.

It is very important to learn if your plans are working effectively. Organizations spend a lot of time, money, and other resources on planning for improvement and change. You may also need to do evaluation in order to secure or maintain funding. You need to know if you have used your resources effectively and if your ideas were appropriate.

Through evaluation, you can decide to continue with your plans or make adjustments to help your plans work better. Evaluations help to uncover problems and give you a chance to correct them. Evaluations may also help you learn new things about how your situation is changing. This enables you to serve these needs better.

Figure 1 | A planning team meets.
Source (USEPA Environmental Protection Agency. "Local, state, regional, and federal stakeholders work together in planning the future farmers markets and downtown," *Wikimedia Commons.* June 26, 2015. Accessed June 21, 2020. https://commons.wikimedia.org/wiki/File:Local,_state,_regional,_and_federal_stakeholders_work_together_in_planning_the_future_farmers_markets_and_downtown._(19153622646).jpg)

When Do We Perform an Evaluation?

Ideally, you should perform evaluations on a regular schedule after allowing some time to implement plans. For example, some organizations like to evaluate their programs every 5 years.

You may also perform an evaluation if something is going wrong and needs to be addressed right away. Evaluations that are prompted by neglected problems are often disruptive to an organization or band, and may be costly.

Who Can Do Program Evaluations?

Any organization can do program evaluation. Your leadership may call for a program evaluation to learn more about how their projects are doing. They may conduct one on their own or they may hire someone to do it.

What Is a Logic Model?

One way to evaluate a program is through a logic model. A logic model helps you to understand change through systematically thinking about your goals and projects. You can see how each step leads to the next step. The model is an opportunity to think about your project's many interdependent parts.

Parts of a Logic Model

Inputs: What resources do you need to start and run the project?

Audience: Who is the project intended to reach? What might they need or like?

Activities: What are the tasks of the project?

Outcomes: What are the direct results of the project?

Impacts: What are the long-term effects of your project?

You start by identifying your inputs and your audience. You connect your inputs and audience to specific activities. From looking at the activities, you list your outcomes. Finally, you can identify your impacts.

A logic model can also help you understand that you have different levels of control over different parts of your project. For example, you may have more control over your inputs, activities and outputs. You have less control over your audience and impacts.

Example

A good example for understanding a logic model is evaluating the process of preparing a meal. When following a logic model, try to think about both broad aspects and small supporting details. Sometimes the smallest details have the biggest impact!

Below, you can think about evaluation questions for the different stages of meal preparation.

1. What are the *inputs* for a meal?
   This could include food ingredients as well as pots and pans, and even the kitchen itself.
2. Who is the *audience*?
   Who are you making the meal for? Friends? Family? An honoured guest?
3. What *activities* go into preparing the meal?
   Shopping, chopping, and cleaning up are all good answers.
4. What are the *outcomes* of preparing this meal?
   You might say that people are fed, and that you used food resources, energy, and water to cook.
5. What are the *impacts* of preparing the meal?
   Perhaps you saved money, or had a healthier meal than you could get at a restaurant. Sharing your meal might help to build community.

Table 1 | Logic model framework example — making a meal.

Goal: Make a Meal				
More Control			Less Control	
Inputs	Activities	Audience	Outcomes	Impacts
• A working stove, refrigerator, & sink, • A knife and cutting board, • Pots, pans, utensils, plates, cups • Knowledge of what people like to eat, • Recipes, • A trip to the store, • Money to buy food, • Food ingredients, • A dining area, • Soap and dishrags for cleaning up.	• Go to and from the store, • Choose foods and pay for them, • Read and follow recipe, • Prepare ingredients by chopping vegetables, beating eggs, etc., • Heat food, • Clean up the kitchen, • Serve portions, • Pack leftovers.	• Your friends and family, • Ticketholders at an event, • Unexpected visitors, • An honoued guest.	• Your guests satisfy their hunger, • You use some water and energy resources, • You produce some kitchen scraps and emptied food packages, • There are leftovers for tomorrow, • A gathering occurs.	• You practice your cooking skills or learn new ones, • You participate in the local economy, • Your kitchen scraps end up in a landfill or a compost pile, • Your guests build relationships or make new ones, • You make more plans for another dinner party

What Resources Are Needed?

Building a logic model is an important task that requires some specific resources. The most important resource is ***time.*** It may take more than one meeting to complete and analyze a logic model. You might choose to have recurring meetings over a few weeks, set aside a few focused days, or even opt for a weekend retreat. A team approach is best. The team should involve dedicated people who are involved in the project. Include people who are able to be fair and objective about the project under evaluation. Keep in mind that this may be an uncomfortable process at times, but the key is to use the process as a learning experience and an opportunity to discover solutions.

Tips for Holding Meetings

- Hold the meetings in a place that is accessible to everyone.
- The meeting room should seat everyone comfortably.
- Build a collection of office supplies for recording ideas and keep it together in a safe but easy-to-reach place.
- Have something to write on that everyone can see. You may use a large pad of drawing paper with an easel or a whiteboard on the wall.
- Bring markers or dry-erase markers and sticky notes.
- Ensure that everyone has a pad and pens/pencils to write down ideas.
- Be ready to take photos of, or record anything that will be erased from a whiteboard.
- A projector that can connect to a laptop may also be helpful.
- Light refreshments are always welcome!

Before beginning, it is very important to gather all relevant information about the project, from the early stages to the current state of things. Both positive and negative feedback about the project should be included. Share this knowledge with everyone on the team, so that everyone can begin at the same place.

Create a schedule for the logic model process. At the beginning of each meeting, briefly review the last meeting so that you stay on track. Have someone take notes for the meetings, and keep their notes in a safe place with the other meeting equipment. You may want to have people take turns, or you may want the same person to take notes each time.

How Do We Succeed at Evaluation?

It is important to be patient and realistic about how much time is needed to evaluate a project. Evaluation works best if it is well-organized from the start. Being organized helps the team to use time wisely. Clear communication among the evaluation team is very important.

For the most thorough evaluation, the project will be examined closely. Team members must be honest about a project's strengths and weaknesses. Teams may need to resolve conflicts and disagreements. Remind everyone of the common goal. Be creative and be caring about people's concerns. Remember that the goal is to make things better and to learn new things about the best way to help.

Most of all, evaluations should happen on a regular schedule, whether it is annually, every five years, or some other timeline that people agree upon. Do not go too long between evaluations. Problems may be brewing, and you will not be aware of them until they become difficult or expensive to fix. Regular evaluation catches problems early. The goal is to be pro-active, not re-active!

For more information on evaluation, see the *Establishing Baselines* and *Understanding KPI's* factsheets.

Final Thoughts

Evaluation is the link between the end and the beginning of a project. Evaluation teaches you important lessons about your work, and helps you to make your future work better. It helps you to see the impact of what you have been doing and makes you feel good about your impacts. You can also learn to face your challenges and develop solutions.

Evaluation can also show you when you need to ask for help. By studying and measuring your outcomes, you can make sure that you use your resources wisely.

Future project participants will also benefit from a clearly recorded history of the work, which ensures continued success and development without having to start from scratch. Finally, you can build problem-solving skills in your community by sharing your lessons with other people who want to do similar projects.

Further Reading

Indigenous Approaches to Program Evaluation by the National Collaborating Centre for Indigenous Health

This article discusses the key parts of program evaluation on a higher level, using the logic model as an example. There is emphasis on adjustability for Indigenous values, and how both Indigenous and non-Indigenous researchers can work in a culturally-sensitive way.

https://www.ccnsa-nccah.ca/docs/context/FS-IndigenousApproachesProgramEvaluation-EN.pdf

Considerations for Culturally Competent Program Evaluation by the Indigenous Child Well-being Research Network

This brief article offers insights into Indigenous values and evaluation. It discusses evaluation components similar to the logic model, and provides suggestions to shape the process to fit Indigenous needs.

https://icwrn.uvic.ca/wp-content/uploads/2011/01/Indigenous-Program-Evaluation-annotated-bib.pdf

Evaluating Indigenous programs: a toolkit for change by Sara Hudson

This is an in-depth report on program evaluation from an Australian Indigenous perspective. It calls for rooting government-led evaluation programs in Indigenous values, as well as keeping up-to-date with research about good evaluation techniques.

https://www.cis.org.au/app/uploads/2017/06/rr28.pdf

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