

**OPPI  
STRATEGIC PLAN  
1999**

July 1999

## **OPPI VISION**

**OPPI is a visionary organization** being a leader in public policy, promoting innovation in the practice of planning in Ontario.

**OPPI is an influential organization** being the recognized voice of planners in the province.

**OPPI is an effective organization** providing services valued by its members.

## 1.0 Background

The Ontario Professional Planners Institute (OPPI) is the recognized voice of planning professionals in Ontario. The *Ontario Professional Planners Institute Act, 1994*, gives OPPI the right to grant certain of its members rights to use the designation R.P.P. (Registered Professional Planner) and enables the Institute to govern the rights and responsibilities of its members.

The Act sets out the objects of OPPI as:

- a) to promote, maintain and regulate high standards of professional planning practice and ethical behaviour;
- b) to further the recognition of the planning profession in Ontario;
- c) to promote the value, use and methods of planning;
- d) to improve the quality of Ontario environments and communities by the application of planning principles;
- e) to encourage participation and co-operation among those persons, associations and groups concerned with improving the quality of Ontario environments and communities; and,
- f) to stimulate the generation, development, dissemination and discussion of ideas on planning.

All members of OPPI are governed by the OPPI Professional Code of Conduct. The Code regulates the conduct of members in the practice of their profession.

### 1.1 1995 Strategic Plan

OPPI's existing strategic plan was developed in 1995 by the Council of the day. The plan was created during a Council retreat. Member comments were requested and incorporated as appropriate. The plan contained a Mission Statement, Goals and Objectives.

#### *MISSION STATEMENT*

*To provide communications, education and networking opportunities to the planning profession enabling our members to meet the challenges of change and to serve the public interest.*

#### *GOALS*

1. *Identify and respond to our members' and their clients' changing service needs.*
2. *Become the recognized representative of the planning profession in Ontario.*
3. *Provide a network of support and resources for practical professionals.*
4. *Identify and promote innovative planning fields/areas/opportunities.*
5. *Manage our financial resources effectively.*

There were 17 supporting objectives. Council and staff with the support of volunteers have been implementing these goals. Substantial progress has been made.

## **1.2 Time For Review**

In 1998, OPPI Council decided to review its strategic plan. The current Council wanted an updated plan that was created with greater participation of membership and that generated commitment from Council and the general membership to its implementation.

The decision to develop a new strategic plan was in response to both external and internal forces affecting the Institute. Change, at all levels of government, was affecting the work of planners in Ontario. A 1997 survey of OPPI members provided information on member expectations and organizational needs that required the immediate attention of Council.

## **1.3 Findings of 1997 Survey of OPPI Members**

The Advantage Group conducted an association survey in 1997. OPPI was one of the associations that participated. The key findings of the survey of OPPI members were:

**What's working?**

- basic services and other deliverables expected from a professional association are available
- services are good quality and effectively delivered
- the Institute has a good communication network
- there is high overall satisfaction among members.

**What's not?**

- members see themselves as customers not owners of OPPI
- they want changes to educational programs with priority given to
  - : addressing access and cost
  - : providing accreditation/certification programs that add value to professional standing
- more focus on activities that increase recognition and respect for the planning profession is needed.

## **1.4 Trends and Challenges**

OPPI prepared an analysis of trends and challenges facing OPPI as a first step in the strategic plan review. The analysis follows.

The early years of the 1990s have been a particularly difficult time for public sector organizations and their employees. Change has been occurring at a rapid pace.

- = transfer of planning functions by federal and provincial governments to others
- = federal and provincial governments reducing planning professionals on staff
- = increased municipal role in planning at a time of severe fiscal constraint

- = significant reduction in number of municipal employers due to amalgamations (approx. 200 municipalities eliminated in a two year period and more occurring)

The world of planning is changing.

- = Planning Act has undergone two substantial rewrites in the 90s
- = shifts from regulatory control and approval authority at the provincial level to local autonomy within a general policy framework
- = continuing pressure to recognize and value the broad scope of planning work being done across the Province.

Of concern is:

- = planners have suffered employment setbacks and are uncertain about their careers
- = new professionals are having difficulty getting their careers started and are moving into unrelated work
- = students, considering career and post-secondary education options, must make sense of these changing employment trends
- = planners are attempting to move into consulting work with limited experience both as a consultant and as a businessperson.

On the positive side:

- = globalization offers planners more opportunities for international work
- = planners have many transferable skills (i.e., planners blending expertise and skills in computer technology, change processes, etcetera with traditional planning functions to create new and dynamic careers).
- = planners are finding work with non-traditional employers (i.e., non-profit sector where their skills can be applied to organizational, program and project management issues).

Organizations that represent professional groups have been challenged to show their relevancy in this changing world. OPPI has not been exempt from this trend. The real threat to professional organizations is the tendency to 'retrench' as their membership and revenues decline and their ability to add value to the professional lives of their members is questioned.

OPPI has been successful in maintaining and increasing its membership.

- = 2754 members in 1997; a modest increase of 4% in five years
- = in the same period, the number of student members has declined as well as the number of students moving into provisional membership
- = a shift from public sector employment to private sector work is taking place (most noticeable in Central District).

In the 1997 membership survey, OPPI discovered that expectations of members towards OPPI were changing.

- = members perceived themselves as customers
- = seeking services of a higher quality that are accessible and competitively priced in the areas of educational programming and advocacy on public policy/government relations
- = members volunteering their time in OPPI is declining
- = members want an accreditation process that is well-regarded by employers and clients and will contribute to employment and income opportunities.

Membership has been maintained in the last five years and revenues are now exceeding expenditures (see Appendix A). **How will OPPI address shifting membership expectations?**

The OPPI Act came into affect in 1994. OPPI will continue to be challenged to demonstrate its leadership in the planning field as other professional groups (architects, landscape architects, engineers) represent planning interests in the province and carry out planning work.

### **Can OPPI gain and maintain the respect and recognition of others as the voice of professional planners in the Province?**

OPPI will continue to be challenged to define the planning field beyond traditional land use planning. **How will OPPI respond?**

### **How will OPPI react to these trends and challenges?**

## **2.0 The Planning Process**

In February 1998, Council dedicated a day to strategic planning.

Council agreed upon a planning process that would encourage a substantial level of member participation. The process is described below.

Council agreed that the new strategic plan must include:

- [ a Vision Statement
- [ Goals and Priorities
- [ specific, measurable and 'doable' Action Plans for Priorities

[ an Implementation and Monitoring Strategy.

Council also developed a draft Vision Statement and directed that a package of background material (ie., Trends and Challenges) be prepared for use by Council and members during the planning process.

## 2.1 Tasks and Timing

Council has maintained its commitment to a process with broad member involvement. This process has taken longer than originally expected but the level of member participation and the resulting Strategic Plan have been worth the time and effort.

Council Retreat		February 1998
District Focus Groups		April - June 1998
Council	Refinement of Vision Development of Goals & Priorities	June 1998
Conference Display & Member Survey		August 1998
Council	Refinement of Priorities Communications with Members - web site - journal articles Create 3 Task Forces to prepare action plans - Recognition - Policy and Innovation - Membership - seek volunteer members for Task Forces	September 1998 October - November 1998
	Establish Task Forces	December 1998
Task Force Work		January - May 1999
Council	Integrate Action Plans Prepare Implementation Strategy	June - August 1999
Council	Present Strategy at Conference/AGM	September 1999
Council	Implement Strategy	October 1999

## 2.2 Member Participation

Meetings were held in all four districts with a combined member participation of 54 persons. At the 1998 conference in Kingston, the display attracted the attention of all members present with 20 persons completing the survey. Appendix B provides a summary of comments received from members concerning OPPI and its future role.

Participation in the three (3) Task Forces has been very good with 29 members contributing to the development of action plans.

## 3.0 Vision, Goals and Priorities

### 3.1 Vision Statement

Council has adopted the following Vision Statement:

**OPPI is a visionary organization** being a leader in public policy, promoting innovation in the practice of planning in Ontario.

**OPPI is an influential organization** being the recognized voice of planners in the province.

**OPPI is an effective organization** providing services valued by its members.

### 3.2 Goals

The following Goals have been adopted:

#### **General:**

OPPI effectively represents all Registered Professional Planners (RPP) in Ontario and holding membership in OPPI has obvious and practical benefits to planning professionals.

#### **Visionary Organization:**

Provide leadership in the development of planning policy in Ontario.

Advocate and advance innovative policy solutions to issues affecting professional planners (RPP).

Maintain a watching brief on government initiatives and work with CIP and other

professional organizations to comment, critique and guide policy work affecting planning in Ontario.

**Influential Organization:**

Broaden public awareness of planning and the role of planners in Ontario, building positive recognition of the professional designation, RPP.

Maintain a strong government relations program.

Work closely with the media, building an understanding of planning issues and accomplishments and enhancing the public image of professional planners (RPP).

**Effective Organization:**

Maintain a large and active membership of planners from all parts of Ontario whose participation in Institute affairs is encouraged and rewarded.

Manage the Institute in an effective and cost-efficient manner, continuously seeking improvements to its operations.

Provide services that are valued by OPPI members and will enhance their professional standing.

Maintain appropriate professional standards for the profession and ensure that the standards are met by professional planners (RPP) in Ontario.

**3.3 Priorities**

Priorities for action are:

**Launch a Public Awareness Campaign**

**Initiate a new Policy Development Program**

**Make Improvements to the Membership Process**

**Maintain a Dynamic Package of Membership Services**

**4.0 Action Plans**

Action plans for the four priorities identified above were developed by the Task Forces. These action plans are described below. An integrated implementation strategy follows.

#### **4.1 Recognition and Policy & Innovation Action Plans**

There are three (3) **audiences** which OPPI wishes to influence:

- i) planners (both RPP and non-RPP members, future planners/students)
- ii) government officials, OMB members, other professional organizations ,  
developers, etc
- iii) the public.

Recognition can be seen to be a progression:  
 from basic AWARENESS  
 through UNDERSTANDING  
 to ADOPTION and PRACTICE.

Our expectations for each audience differs. We are seeking the following level of recognition concerning the planning profession and the role of OPPI from our audiences.

As shown below, we would like 90% of the general public to be aware of professional planners with as many as 40% understanding and adopting our messages about planning done by professional planners (RPP). Our expectations of other audiences is greater.

	PUBLIC	GOV'T, ETC	PLANNERS
ADOPTION & PRACTICE			
UNDERSTANDING			
AWARENESS			

	90%
	70%
	40%
	0%

A **core message** as well as **audience-specific messages** are required. The messages should contain the following elements:

- Core = good planning as practiced by professional planners (RPP) adds value to our communities
- Public = the positive contributions of planning professionals can be seen everywhere in our daily lives
- Planners = being a member of OPPI and holding the designation of RPP has obvious and practical benefits
- = planners should feel good about their contributions to Ontario's communities
- = planners demonstrate their skills, knowledge and value as members of the community through work beyond their planning duties every day
- Gov't = professional planners (RPP) have unique knowledge and skills that are
- Prof. Org. = fundamental to the practice of planning
- Etc. = professional planners (RPP) are best qualified to guide the planning process in Ontario
- = through OPPI, professional planners (RPP) can and will lead the discussion in Ontario on planning policy
- = planning professionals, supported by OPPI, maintain high standards of practice, the value of which is demonstrated by the livability of communities across Ontario.

With professional assistance, these messages can be improved and focused to increase impact on the target audiences.

To reach these audiences with our messages, OPPI will:

- [ Launch a Public Awareness Campaign
- [ Initiate a new Policy Development Program

These strategies for action are described below.

OPPI believes that success will be achieved in all actions through a partnership of volunteer effort by its members supported by specialists employed by the Institute.

OPPI believes that all actions must be sustained to achieve their full potential. Continuing commitment of resources, financial and human, is critical to this effort.

## **ACTION PLAN - PUBLIC AWARENESS CAMPAIGN**

**GOALS:** Broaden public awareness of planning and the role of planners in Ontario, building positive recognition of the professional designation, RPP.

Maintain a strong government relations program.

Work closely with the media, building an understanding of planning issues and accomplishments and enhancing the public image of professional planners (RPP).

**ACTION:** Market through the mass media a positive identity of planners/planning.

The campaign is targeted at the public with collateral results for our other audiences.

The core message will be used along with audience-specific messages. For the public, we are trying to build a high level of basic awareness, moving a portion of the public to an understanding and adoption of planning as a valuable aspect of community-building (see earlier discussion of Audiences in Section 4.1).

Professional expertise is required for OPPI to succeed in this campaign.

### **PARTNERS & RESPONSIBILITIES:**

OPPI Council has sufficient 1999 budget to allow the Recognition Task Force to seek bids from professionals and secure a firm cost for a fully developed campaign design/communications plan. Council reviews and approves in principle prior to Annual General Meeting.

Recognition Task Force and Council, at the 1999 AGM in September 1999, seek support-in-principle of general membership for campaign. Information booth/display set up at conference.

Professionals contracted to develop campaign strategy, probably multi-year, and to implement campaign in 2000, under the direction of Council. Include evaluation component to determine impact of campaign on Public and collateral affects on other audiences.

Staff implications reviewed and addressed by Council in 2000.

**RESULTS:** By end of 2000, evaluation demonstrates that campaign is increasing basic awareness of Public.

Review campaign with general membership at conference and AGM in 2000.

Campaign for second year is refined, as necessary, with greater emphasis on other audiences.

**TIME FRAME:** See above.

**STATUS:** New initiative.

## **ACTION PLAN - POLICY DEVELOPMENT PROGRAM & COMMUNITY APPLICATIONS**

- GOALS:**
- Provide leadership in the development of planning policy in Ontario.
  - Advocate and advance innovative policy solutions to issues affecting professional planners (RPP).
  - Maintain a watching brief on government initiatives and work with CIP and other professional organizations to comment, critique and guide policy work affecting planning in Ontario.

- ACTION:**
- Action is two-fold:
- ii) **Maintain Watching Brief on Government Initiatives**, providing comment, etc.  
  
It has been identified that this OPPI function can be improved and that further strategy work is needed with serious consideration given to:
    - involving more members in the work
    - emphasizing District comment on regional issues
    - addressing staff support needs of volunteers.  
The ultimate goal is ensuring that the OPPI response is timely and substantive.
  - ii) Implement a new policy development program that demonstrates the leadership role of OPPI in planning policy.  
  
The **Policy Development Program with Community Applications** is described below.

- DESCRIPTION:**
- Policy development should occur on a cycle of:
- |         |   |
|---------|---|
| Year 1  | Research & Development  |
| Year 2  | Launch Policy Building Awareness & Understanding                    |
| Year 3+ | Through Community Applications Gain Adoption & Demonstrate Practice |
- As a policy topic advances through the cycle, another topic can begin, perhaps as frequently as one new topic each year.

Criteria for selecting policy topics are:

- = the topic and policy developed has province-wide relevancy
- = topic is anticipated to have substantial impact on planning in Ontario within the next decade
- = topic affects/will affect a large segment of Ontario's population
- = policy will directly affect the practice of planning
- = currently, there is little research and analysis of topic occurring
- = the public will be 'well-served' by the findings and recommendations of the policy development work
- = the policy development work can be completed in the specified study year
- = potential for community applications is demonstrated.

### **PARTNERS & RESPONSIBILITIES:**

In Years 2000 and 2001, it is recommended that OPPI select and direct policy development, as follows:

Chaired by the Director, Policy Development and with 1 volunteer member from each district appointed by Council and with 1 representative of a recognized Planning School, also appointed by Council, the new Policy Development Committee, with the support of staff, will:

- = develop a proposal call for policy development study project
- = advertise the call for proposals, using existing OPPI communications tools
- = receive proposals from among OPPI members (eligible participants)
- = review proposals using criteria
- = recommend to Council acceptance of a proposal with associated resource implications
- = monitor policy work, meeting with successful member as work progresses and addressing work plan issues
- = upon completion, submit policy statement to Council with recommendations for launch, ongoing promotion and opportunities for applications across Ontario.

In Year 2002, it is recommended that Council review opportunities:

- = to increase public involvement in selection of policy topics
- = to partner with other organizations in policy development work
- = **District-specific Community Applications** of policy developed under the direction of and by District members.
- = for joint policy work with other professional organizations.

**RESULTS:** Year 2000 - hold first proposal call and make commitment to first successful applicant by mid-year

Year 2001 - hold second proposal call, etc.  
- launch first policy statement

Year 2002 - Community Applications for first policy statement begin  
- and so on

Success will be measured by:

- = the level of recognition generated among target audiences by policy work
- = the adoption and practice of policy statement among target audiences.

**TIME FRAME:** See Results.

**STATUS:** New initiative.

## 4.2 Membership Action Plans

As an effective organization, OPPI will strive to achieve the following **Goals**:

Maintain a large and active membership of planners from all parts of Ontario whose participation in Institute affairs is encouraged and rewarded.

Manage the Institute in an effective and cost-efficient manner, continuously seeking improvements to its operations.

Provide services that are valued by OPPI members and will enhance their professional standing.

Maintain appropriate professional standards for the profession and ensure that the standards are met by professional planners (RPP) in Ontario.

There are three **audiences**:

- iii) practicing planners
- iv) future planners/students
- v) professionals in related fields.

This multi-pronged strategy for action narrows and distinguishes among the target audiences based on the proposed action and desired outcomes, for example:

- i) increasing membership focuses on:
  - non-member senior practitioners
  - future planners/students
  - professionals in related fields
- ii) resolving membership issues focuses on:
  - long-standing provisional members
  - non-member senior practitioners.

The **messages** have been identified in the Recognition Task Force Action Plan as:

Planners = being a member of OPPI and holding the designation of RPP has obvious and practical benefits  
= planners should feel good about their contributions to Ontario's communities  
= professional planners demonstrate their skills, knowledge and value as members of the community through work beyond their planning duties every day.

The Membership Task Force recommends some **sub-messages** to be directed at planners are:

- = OPPI understands and encompasses the full range of planning practice in Ontario and promotes this broad definition of professional planning practice across Ontario
- = OPPI offers a dynamic package of benefits and services to its members that enhance their professional careers
- = OPPI is the only organization that advocates for professional planners and enhances your standing with employers and the public.

To achieve our goals as an effective organization, OPPI will undertake:

- [ Public Awareness Campaign (see Recognition Task Force Action Plan)

The campaign should:

- = emphasize the practical benefits of membership to planners and employers
- = publicize and give more visibility to current OPPI activities such as presentation of membership certificates and Awards of Excellence
- = encourage employers to require RPP designation among its planning staff

- [ Make Improvements to the Membership Process

- [ Maintain a Dynamic Package of Membership Services

OPPI believes that membership in the Institute is a two-way street:

- = members expect and should receive quality services that enhance their professional standing;
- and
- = members must contribute to the success of the Institute through voluntarism in Institute activities and community work.

OPPI believes that all actions must be sustained to achieve their full potential. Continuing commitment of resources, financial and human, is critical to this effort.

## **ACTION PLAN - MEMBERSHIP PROCESS IMPROVEMENTS**

**ACTION:** Action is two-fold.

**Increasing Membership** requires that the Institute:

- ensure that all professional planning practice is recognized and accommodated within OPPI's definition of planning practice and is reflected in the membership process
- maintain an aggressive outreach strategy with future planners/students
- allow professionals in related fields to participate in the Institute through an appropriate class of membership.

**Resolving Membership Issues** focuses on two groups of planners:

- take aggressive action to move long-standing provisional members to full membership status
- establish a process that encourages senior practitioners to seek and achieve full membership, recognizing their years of professional practice.

### **INCREASING MEMBERSHIP**

- DESCRIPTION:**
1. There continues to be concerns about the OPPI definition of planning and the application of this definition in the membership process of the Institute. Steps to be taken include:
    - i) Research last five years of experience with candidates for membership to determine the impediments and concerns with membership process and whether the perception that the process is biased towards traditional land use planning experience is justified.
    - ii) If so, undertake changes to definition of planning (eg., emphasis of planning methods, processes and skills) and membership process to recognize full range of planning practice. Explore definition with audiences to determine their perceptions of 'professional planner'.
    - iii) Establish standard training program for Examiners, including written advisory material and an annual training session held by the Registrar, to ensure that the membership examination process is consistently applied across the province.

2. OPPI must reach students:
  - i) when they are making career and post-secondary education decisions, to promote the value of a career in professional planning. Our efforts must include:
    - better use of our web site with material targeted to senior high school students and with 'hot links' to other related sites such as: Ministry of Education and Training's Career Gateway; university sites, etcetera
    - production of a brochure for distribution to high school student services departments; the brochure highlights planners (eg., our 'champions') and their exciting careers and demonstrates the diverse range of job opportunities available to planners.
  - ii) when students have chosen planning as a profession, reach out to them in the planning school setting to demonstrate the value of achieving RPP designation.
3. OPPI needs to accommodate interest in membership from professionals in related fields using methods that include:
  - i) offering a class of membership that allow for 'associates' who do not need to meet all criteria of full membership but who also do not receive RPP designation
  - ii) entering into reciprocal arrangements with other professional organizations for joint memberships.

## **RESOLVING MEMBERSHIP ISSUES**

- DESCRIPTION:**
1. Take aggressive action to move long-standing provisional members to full membership status by:
    - promoting value of RPP designation (recognition by employers; use at OMB, etc.)
    - offering members a membership process that supports accreditation and recognizes broad planning experience
    - imposing a membership processing fee on an annual basis while member holds provisional status
    - withdrawing membership if provisional status extends beyond 5 years (unless extension is requested and approved by Deputy Registrar); member must reapply and start over again

- limiting access to and/or distinguishing between services available to provisional versus full members.

2. Establish a process that encourages senior practitioners to seek and achieve full membership, recognizing their years of professional practice. The process can include:
  - i) OPPI Examiners devise an alternative method of processing membership for senior practitioners that:
    - recognizes their years of practice and accumulated knowledge
    - provides for a single meeting session to achieve RPP designation.
  - ii) Council considers and approves alternative method.
  - iii) Districts nominate individuals with 20 years or more of professional planning experience who are currently holding a senior planning position to be processed for membership through the alternative method.
  - iv) Council invites nominees to participate and Examiners conduct alternative method.

## **ACTION PLAN - DYNAMIC PACKAGE OF MEMBERSHIP SERVICES**

**ACTION:** **Continuously Review and Adjust Package of Membership Services** in response to member needs and demands.

**DESCRIPTION:** OPPI offers its members a variety of services. These include:

- = Journal (6 issues per year)
- = Web Site
- = Membership Communications by Broadcast Fax and Email and Mailings
- = mailing of job postings
- = Consultants Directory (published bi-annually) with computer generation of lists by expertise, etc. and mailings of proposal calls, etc.
- = access to group benefit plans and insurance plans
- = professional development sessions
  - OPPI only and jointly with others (ie., MMAH, AMO, OPALL, etc.)
  - such as Planner at the OMB and Alternative Dispute Resolution
- = mentoring program for planners
- = annual conference
- = District events (policy, professional development and social)
- = advocacy on policy and legislative issues and participation on government task forces, technical committees, etc.
- = training for others - partnership with AMO on New Councillor Training (planning component)
- = access to national and international associations and activities
- = ethical standards
- = access to and maintenance of RPP certification.

The services offered by OPPI have grown and changed over the past five years. As noted from the survey of members, services are important to members and they want OPPI to focus on activities that enhance their professional development and standing.

1. Carry out surveys of members on satisfaction with current service and suggestions for new services that would enhance their professional standing.
2. Effectively market services to members and potential members.
3. Increase joint programming with related professional groups and

others.

## **5.0 Implementation and Monitoring Strategy**

The strategy and its action plans have an impact on all aspects of the Institute's operation. The strategy must integrate the actions and specify how resources will be used for implementation.

There are some principles that have been stated earlier about implementation that must be restated here.

OPPI Council believes that success will be achieved in all actions through a partnership of volunteer effort by its members supported by specialists employed by the Institute.

OPPI Council believes that membership in the Institute is a two-way street:

- = members expect and should receive quality services that enhance their professional standing;
- and
- = members must contribute to the success of the Institute through voluntarism in Institute activities and community work.

OPPI Council believes that all actions must be sustained to achieve their full potential. Continuing commitment of resources, financial and human, is critical to this effort.

OPPI Council believes that the Priorities for Action can be implemented using existing financial resources will require that Council, during its budget process:

- = reallocate funds to priority areas to meet ongoing costs
- = use some funds in reserves for one-time costs.

Organizational changes are required to effectively implement the action plans. These changes affect:

- = Council and its committees
- = staffing
- = District mandates and activities
- = use of contracted services
- = participation of members.

### **5.1 Timing**

The following flow chart brings together the timing suggested in each action plan and incorporates timing for the organizational needs of implementation as described below.

## 5.2 Financial Requirements

A summary of the 1999 OPPI budget follows.

<b>1999 BUDGET - REVENUES</b>	
<b>DESCRIPTION</b>	<b>VALUE (\$)</b>
Membership Fees	\$380,689.
Other Fees	19,080.
Prof Development Programs	89,300.
Conference	111,975.
Journal	53,352.
Other Income	40,177.
<b>Total Income</b>	<b>\$694,573.</b>
<b>EXPENSES</b>	
<b>DESCRIPTION</b>	<b>VALUE (\$)</b>
Salaries and Administration	\$216,776.
Office Expenses	124,492.
Council & Committees (including programs)	81,905.
Journal	58,800.
Professional Development	62,654.
Conference	92,323.
Special Projects	23,000.
District Allocations	29,500.
<b>Total Expenses</b>	<b>\$689,450.</b>

### **Summary**

Total Revenues	\$694,573
<u>Total Expenses</u>	<u>\$689,450</u>
Surplus	\$ 5,123

The **Public Awareness Campaign** requires:

1. a one-time budget of approximately **\$30,000** in 1999/2000 to contract professional services for design and evaluation of the Campaign. Budgetary requirement can be met from expected 1999 surplus operating funds.
2. until the campaign is designed, implementation costs for 2000+ are not known. A new budgetary requirement must be included in 2000 and 2001 budgets.

The **Policy Development Program** requires:

1. The successful applicant will dedicate a portion of 2000/01 to development of the policy topic. Estimated at one third to one half of their time and including basic expenses, the cost is **\$20,000 to 30,000 per study year**. A new budgetary requirement that must be included in 2000 budget.
2. Out-of-pocket expenses associated with the Policy Development Committee are anticipated at **\$2,500 per annum**. Funds available from existing budget allocation for Policy Committee.
3. Promotional costs are projected at **\$2,500 per annum**. A new budgetary requirement that must be included in 2000 budget.
4. The Policy Development Program makes a direct link between the existing **Awards of Excellence** and Community Applications recommending that they be highlighted with regular awards made to these projects.

The **Membership Services** actions require:

1. A core of services will be part of the package of professional support that membership received for the annual fees paid.
2. As OPPI responds to demands for services, a greater number of these will be offered on a user pay basis.
3. The total package of membership services should be self-sustaining, perhaps providing the Institute with modest profits that can be directed to Recognition and Policy work.
4. Costs of Examiner Training initiative are projected at **\$8,600**.
5. Costs of web site upgrades/changes budgeted at **\$20,000**.

Greater emphasis is being placed on some current tools, in particular the OPPI web site. This tool must be seriously examined to ensure that it is properly designed to serve the intended/desired purposes.

6. Costs of student brochure and outreach are projected at **\$6,000.**

### **5.3 Implications for Council and its Committees**

Council is composed of 13 members being: President, Past-President, 5 Directors who chair standing committees, 5 Directors representing the Districts, and a non-voting Student Delegate.

The five standing committees are:

- Membership Services and Outreach
- Communications and Publications
- Professional Development
- Public Policy
- Public Presence.

Review of the mandates and operation of these committees of Council in light of the Goals and Priorities of the strategic plan has been recommended.

The Membership Task Force concluded that three committees had overlapping mandates leading to inefficient use of volunteers and hindering the effective delivery of member services. The following committees could be merged into one Membership Services Committee:

- Membership Services and Outreach
- Communications and Publications
- Professional Development.

The new direction for policy development in the Institute is best delivered through an expanded Policy Development Committee.

To implement the Recognition Strategy effectively, the Public Presence Committee is renamed the Recognition Committee and assumes a new mandate and committee structure in order to be able to effectively guide and monitor the Public Awareness Campaign.

New organizational charts for Council and its Committees follows.

Council will put this new committee structure into practice for six (6) months, review in the spring of 2000 and if functioning as desired, bring forward any necessary constitutional amendments at the 2000 Annual General Meeting.

## 5.4 Implications for Staffing

OPPI currently has four (4) staff persons (4 FTE) whose allocation of duties over functional areas can be summarized as follows:

Current Responsibilities	Executive Director	Deputy Registrar	Financial & Admin. Officer	Receptionist
Administration	15%	10%	60%	55%
Membership Process	5	60	5	10
Membership Services	50	20	25	20
Public Presence	20	10	10	15
Policy	10	0	0	0

Generally, there needs to be adjustments to the responsibilities and distribution work across responsibilities of existing staff. It is also being recommended that one (1) additional staff person be added to assume responsibilities for Policy work and to assist with Membership Services.

**Recognition** initiatives requires:

1. The **Public Awareness Campaign** will have staffing implications relating to ongoing maintenance of the campaign. These needs will be determined in 2000 and take affect in 2001. In 2000, the Executive Director will be involved in decision-making pertaining to selection of professional services and acceptance of the campaign design.
2. The Executive Director, on an ongoing basis, should dedicate **40%** of his/her time to **Recognition** and **10%** to **Membership Process**, with less time spent on **Membership Services** (down to **25%**).

**Policy** work requires:

1. The **Policy Development Program** requires staff support estimated at **1/4 FTE per annum**.
2. Current policy work associated with **Maintaining a Watching Brief on Government** requires greater commitment of staff time to support the volunteer efforts of members. It is estimated at **1/4 FTE per annum**.

**Membership Services** will have the following impact on staffing requirements:

1. Presently, no staff position is responsible for the OPPI web site. Staff are coping with work demands of the site but with greater use of the site desired, greater staff commitment is required.
2. The increased focus on membership issues, requires that the Deputy Registrar dedicate a greater amount of his/her time (up to at least **80%**) to the **Membership Process** initiatives outlined in the strategy. Other duties (**Membership Services** at 25%) must be shifted to other staff (see below).
3. It is recommended that **Membership Services** be allocated an additional **1/2 FTE per annum** to replace the efforts of existing staff that is being directed to other responsibilities. This staff person should focus on improving and increasing the user pay services and act as Volunteer Coordinator, promoting greater voluntarism among members.

## **5.5 Implications for Districts**

Currently, Districts are mandated to:

- = promote membership in OPPI
- = maintain communications and promote networking among members
- = offer social activities
- = host annual OPPI conference
- = encourage members to participate in OPPI committees
- = develop and offer topical and educational sessions
- = carry out membership process responsibilities.

The strategy recommends that Districts:

- = develop and direct Community Applications relating to the Policy Development Program.

APPENDIX A

**MEMBERSHIP STATISTICS (1993- 97)**

Year	Full	Provisional	Retired	Student	Public Associate	Pub Assoc. (Student)	TOTAL Members
1993	1190	876	60	478	25	19	2648
1997	1379	862	58	418	13	24	2754

Year	TOTAL Members	Public Sector	Private Sector	Other
Central District				
1993	1762	778	555	79
1997	1834	791	646	75
Eastern District				
1993	313	156	75	16
1997	324	171	91	15
Southwestern District				
1993	459	200	94	29
1997	478	206	130	24
Northern District				
1993	88	51	18	4
1997	92	52	27	0

## REVENUES & EXPENDITURES (1993-97)

Year	Revenues	Expenses
1993	\$370,460	\$388,669
1997	\$701,534 (89% increase from '93)	\$685,897 (76% increase from '93)

### NOTES:

1. In 1993, OPPI incurred a loss of \$18,209. Taking into account the accumulated financial performance of the Institute, in 1993, OPPI had a debt to retire.
2. The substantial increase in both revenues and expenditures of the Institute from 1993 to 1997 is due, among other things to:
  - assuming financial responsibility for annual conference
  - increase in membership services including those offered on a user pay basis.
3. In 1997, OPPI had a modest surplus of \$15,637. Taking into account the accumulated financial performance of the Institute from 1993 to 1997, the financial standing of OPPI in 1997 was \$140,706 in reserves. A surplus of \$11,779. was recorded in 1998.

## APPENDIX B

### RESULTS OF MEMBERSHIP CONSULTATIONS

Through District focus groups and 1998 conference display and survey, the following member comments were collected:

#### VISION

- = a strong policy development function that gets us ahead of the issues
  - be aggressive and innovative
  - “take a public stand” on province-wide issues such as sustainability, economic development and social/cultural issues
- = a cohesive organization speaking with one voice
- = increased public profile and greater influence with government at all levels
- = credibility as an “association” of similar professionals
- = need ‘planning’ definition that the public can easily understand
- = recognize and promote “multifaceted” nature of profession

#### ACCOLADES

- = OPPI is good at
  - : networking and communicating i.e., Journal
  - : education programs (need more!)
  - : staff support to members
  - : improved financial responsibility
  - : improved value for membership fees
  - : new products i.e., Consultants Directory

#### PRIORITIES

1. Be on the Leading Edge
  - = OPPI is researching trends (eg., demographic) and anticipating the changing world of planning promoting innovative policy development and planning techniques
2. The Planner in the Community
  - = encourage more participation of members in community affairs and recognize and reward this activity
3. Focus on Professional Recognition
  - = introduce requirements/standards for maintaining professional competence
    - accreditation for full members
    - reinforce with clear and consistent enforcement of discipline

4. Address Membership Issues
  - = more membership
  - = more membership categories to allow for lay person involvement
  - = improved membership processes that recognize diverse planning experience
  - = what is planning/what work qualifies a planner for membership? It is more than land use planning but how much more?
  - = focus on student planners and new planners
    - : successfully entering work force as planners (Internships)
    - : moving from provisional to full membership
    - : participating in OPPI
    - : working with Planning Schools on curriculum
  - = encourage employers to seek and employ RPPs
  
5. Support Skills and Professional Development
  - = recognize a set of core skills that are common requirements among the specialized fields within the planning profession
  - = promote life long learning within the profession > focus on diversifying skills and knowledge of members
  - = more accessible and affordable education programs tied to maintaining professional standing and “leading edge” practices
  - = develop and market professional development products > ‘how to’ manuals
  
6. Establish Organizational Linkages
  - = more connection with other professional associations
  - = increase/improve relationships with CIP, APA and other international planning associations
  
7. Increase Marketing and Public Awareness
  - = undertake a ‘planning heroes initiative’
  
8. Make Organizational Improvements
  - = reduce customer ‘mentality’ among members and build active ownership of OPPI
  - = use telecommunications “to the max” as a means of marketing and communicating among members
  - = more planning information available to members by internet, etcetera
  - = more user pay services and professional development opportunities
  - = improve skills of membership committees in basic tasks

## BUDGET PRIORITIES

1. support District-level programs and activities
2. OPPI Journal
3. professional training and skills development
4. marketing professional planners abroad
5. public relations
6. membership outreach/new member campaign
7. more staff effort to support and sustain policy development
8. basic services such as job postings and web site

