Skills for Future Planners

PAB Sponsored Session

Speaker & Moderator:
Michelle M. Thompson, Ph.D., GISP

Speakers:
Carissa Schively Slotterback Ph.D., FAICP
Justin Hollander, Ph.D., FAICP

ACSP Conference October 20, 2023
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Refer to the Mastercard Data Analytics Production Order Form dated November 6, 2020 for additional details

Note: Read the Mastercard Global Data Responsibility Imperative
Analytical skills and tools

Research and critical analysis skills for preparing and conducting research; quantitative and qualitative methods of data collection, analysis, and forecasting; methods of geo-spatial analysis, mapping and data visualization; data analytics and urban technology.
equitable and inclusive economic growth: a focus on data-driven insights

By Dr. Michelle M. Thompson

October 20, 2023

Association for Collegiate Schools of Planning – Chicago, 2023
Understanding Financial Inclusion in New Orleans

Businesses and governments increasingly rely on consumer and user insights to decide where to invest. Those insights can have a positive impact on lower income and underserved communities if the investments are applied across a wider socio-economic spectrum. A comprehensive and integrated data solution that provides a more complete picture of community wealth and purchasing power.
The Mastercard Center for Inclusive Growth “advances sustainable and equitable economic growth and financial inclusion around the world. Established as a philanthropic subsidiary of Mastercard, we activate the company’s core assets to catalyze action on inclusive growth through: research, data, programs and engagement.”

Mastercard’s Geoinsights solutions provides macro and micro economic trends across industries, with paired publicly-available aggregated census data for context.

NOLA Financial Equity Project: Background & Analysis Areas

• Pro-bono effort by Mastercard Center for Inclusive Growth leveraging Mastercard anonymized and aggregated data

• 60 Data Scientists & Techs conducted ‘Datathon’ to evaluate the City of New Orleans, Livable Claiborne Corridor (LCC) and the Claiborne Cultural Innovation District (CID) in 2019

• Used ‘real time’ Mastercard data to identify spending patterns and trends

• Co-led by Mastercard Data & Services

• Co-led by Edward Lee, Mastercard Center Data Scientist

• Co-led by Dr. Michelle M. Thompson, UNO PLUS Associate Professor and Mastercard Center Senior Data Fellow

https://www.mastercardcenter.org/
Livable Claiborne Corridor / Claiborne Corridor Cultural Innovation District

New Orleans Census Tracts generally align with Neighborhood boundaries. The Livable Claiborne Corridor (LCC) boundaries do not completely incorporate all neighborhood boundaries/census tracts.
New Stores openings each year in the Livable Claiborne Corridor.

Claiborne Cultural Innovation District accelerates in after Cultural District Taxation overlay approval in 2016.
GeoInsights leverages anonymized and aggregated Mastercard transaction data to understand localized trends in economic behavior. The data are index values, where the average score in the NOLA metro area is 100. A score of 200 represents 2x the average spend in the metro area, and a score of 50 represents ½ the average spend.

All aggregated demographic data included in GeoInsights is from the American Community Survey.

GeoInsights is currently being trialed by NOLA City Government, providing key commercial data inputs during the COVID-19 crisis.
Mastercard partnered with Chicago organizations throughout this initiative.

**Chicago Dept. of P&D**
Partnered with Commissioner Maurice Cox of the Chicago Department of Planning and Development.

**New America Chicago**
Close partnership with Meegan Dugan-Bassett, Chicago-based New America fellow. Provided local context and priorities.

**Chicago Community Trust**
CCT unites generous donors, committed nonprofits and caring residents to effect lasting change.

**University Outreach**
Local university outreach included the University of Chicago Spatial Data Center and community engagement offices.

**INVEST South/West Communities**
Including New City Back of the Yards CDC, Greater Englewood neighborhood network and several Aldermen.
The pandemic has driven unprecedented changes in economic activity across the country, greatly affecting both consumers and businesses*. Chicago has not been isolated from this impact.

- Mastercard data-driven insights indicate that spending activity in Chicago declined by 26% during the pandemic, compared to same time last year
- The loss of revenue differed greatly by neighborhood, industry, and business size.
- Small businesses experienced bigger drop in spending (-31.5%) as compared to chain businesses (-24.2%)

City of Chicago analysis indicates a -26% drop in spending & an economy that is still recovering.
Jacqueline Ngo Mpii is the founder of Little Africa, a black-owned travel agency that works to educate travelers about African culture in Paris through walking tours, literature, and events.
“Using Data-Driven Insights to Help Revive a Historic New Orleans Neighborhood”

by Dr. Michelle M. Thompson & Edward Lee

October 16, 2019

https://www.mastercardcenter.org/insights?type=Data-Insights

“Data Driven Insights to Build Connected Communities”

by Dr. Michelle M. Thompson, Edward Lee and Barbara Ray

July 19, 2021

Data driven insights to build connected communities (mastercardcenter.org)
Questions?

Michelle M. Thompson, PhD, GISP
University of New Orleans
Department of Planning & Urban Studies
mmthomp1@uno.edu
504-280-6593
https://works.bepress.com/michelle_m_thompson/

Slide deck design created by Maya Struhar for
“Environmental Justice on the Mississippi” forum
presented by Jillian Croci, William Sedgwick, & Maya
Struhar - University of New Orleans, 12/21/2021

“The Analytics of Hope: Data-Driven Community Development in New Orleans”

Video 3min 27s

https://www.washingtonpost.com/brand-studio/mastercard/the-analytics-of-hope/
Planning Process + Engagement

Carissa Slotterback, PhD, FAICP
ACSP PAB October 20, 2023
PAB Guidelines

Planning Process + Engagement

“Planning process and community and stakeholder engagement, plan creation and implementation, methods of design and intervention to understand and influence the future”

AICP Code of Ethics: “Facilitate the exchange of ideas and ensure that people have the opportunity for meaningful, timely, and informed participation in the development of plans and programs that may affect them. Participation should be broad enough to include those who lack formal organization or influence, especially underrepresented communities and marginalized people. Attention and resources should be given to issues of equity, diversity, and inclusion and should reflect the diversity of the community.”
<table>
<thead>
<tr>
<th>Teach Planning Process + Engagement Together</th>
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<tbody>
<tr>
<td><strong>Access to data and analysis tools is greater than ever</strong></td>
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<tr>
<td><strong>Planning analysis must include “local” knowledge</strong></td>
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<td><strong>Strategies:</strong></td>
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<td>Student audit of comp plan to identify engagement interventions</td>
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<td>Respond to an RFP for a plan and planning process – practicing planner review panel</td>
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PARTICIPATION PROCESS

STEP 1
MATS stakeholder list review and update. Inform and advise how to participate in the process

STEP 2
Survey asking broad questions concerning the transportation system will be conducted

STEP 3
Determine Vision, Goals, and Objectives of the plan

STEP 4
Conduct environmental justice analysis. Determine strategies for input from affected constituencies

STEP 5
Conduct introductory Open House

STEP 6
Identify transportation problem areas, develop alternatives and improvements

STEP 7
Planned improvements selected and tested, presented at open house for public comment

STEP 8
Results of Step 7 presented at Open House

STEP 9
Consultation with other organizations impacted by the transportation plan

STEP 10
Development of draft Long Range Plan

STEP 11
Open House to present final draft Long Range Plan

STEP 12
Formal public hearing and adoption. Announced via web and newspaper with the required notice period for comment in advance.

Entire Process - Postings on MATS website of elements and draft documents

Entire Process - Input and public comment at MATS Policy and Technical Committee meetings

MDOT and FHWA Approval - Once all approvals have been received, the final document is also posted on the MATS website.
Teach Design Guidelines, Not Just Tools

**Table 1** Design Guidelines for Public Participation

<table>
<thead>
<tr>
<th>Assess and design for context and purpose</th>
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<tbody>
<tr>
<td>1. Assess and fit the design to the context and the problem</td>
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<tr>
<td>2. Identify purposes and design to achieve them</td>
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<th>Enlist resources and manage the participation</th>
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<td>3. Analyze and appropriately involve stakeholders</td>
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<td>4. Work with stakeholders to establish the legitimacy of the process</td>
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<td>5. Foster effective leadership</td>
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<td>6. Seek resources for and through participation</td>
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<td>7. Create appropriate rules and structures to guide the process</td>
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<td>8. Use inclusive processes to engage diversity productively</td>
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<td>9. Manage power dynamics</td>
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<tr>
<td>10. Use technologies of various kinds to achieve participation purposes</td>
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<th>Evaluate and redesign continuously</th>
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<tr>
<td>11. Develop and use evaluation measures</td>
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<tr>
<td>12. Design and redesign</td>
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*Note: These are interrelated, iterative tasks, not a step-by-step template.*

Figure 1 The Cycle of Public Participation Process Design and Redesign (Numbers indicate the corresponding design guidelines.)

Bryson, Quick, Slotterback, & Crosby 2012

Is there a standard public participation process?
IAP2’s Spectrum of Public Participation was designed to assist with the selection of the level of participation that defines the public’s role in any public participation process. The Spectrum is used internationally, and it is found in public participation plans around the world.

### Increasing Impact on the Decision

<table>
<thead>
<tr>
<th>INFORM</th>
<th>CONSULT</th>
<th>INVOLVE</th>
<th>COLLABORATE</th>
<th>EMPOWER</th>
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<tr>
<td><strong>Public Participation Goal</strong></td>
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<tr>
<td>To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities and/or solutions.</td>
<td>To obtain public feedback on analysis, alternatives and/or decisions.</td>
<td>To work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered.</td>
<td>To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution.</td>
<td>To place final decision making in the hands of the public.</td>
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<tr>
<td><strong>Promise to the Public</strong></td>
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<td><strong>Promise to the Public</strong></td>
</tr>
<tr>
<td>We will keep you informed.</td>
<td>We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision.</td>
<td>We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision.</td>
<td>We will look to you for advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.</td>
<td>We will implement what you decide.</td>
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Assessing context is crucial skill

Part of context is the planner – what is their relationship to community

AICP Code of Ethics: “Examine our own cultures, practices, values, and professional positions in an effort to reveal and understand our conscious and unconscious biases and privileges as an essential first step so we can better serve a truly inclusive public interest promoting a sense of belonging.”

Tools are the easy part

Strategies:

Students conduct context assessment or develop context assessment tool

Engagement process case study – interview multiple participants – how did planners make design choices? how did planners think about their relationship to community?

Student reflection on positionality, blindspots
Engagement as Long-Term Capacity Building

Think more expansively than just engagement in a planning process

“…Participation is oriented to increasing input for decisions. Practices for organizing highly participatory processes encompass inviting many people to participate, making the process broadly accessible to and representative of the public at large, and collecting community input and using it to influence policy decisions.” “Enhancing participatory practices enriches the input received…”

“…enhancing inclusive practices builds the capacity of the community to implement the decisions and tackle related issues. Inclusion is oriented to making connections among people, across issues, and over time. It is an expansive and ongoing framework for interaction that uses the opportunities to take action on specific items in the public domain as a means of intentionally creating a community engaged in an ongoing stream of issues.”

Source: Quick & Feldman (2011)
Engagement as Long-Term Capacity Building

Focus on building long-term relationships among all involved – nurtured over time

Effective participation builds support for implementation

Strategies:

Engage a planner panel to discuss how they think about positionality

Explore methods for ongoing engagement
Focus on Underrepresented + Actively Excluded

All communities, underrepresented, marginalized – most traditional participation methods fail

AICP Code of Ethics: “Be conscious of the rights of others. Develop skills that enable better communication and more effective, respectful, and compassionate planning efforts with all communities, especially underrepresented communities and marginalized people, so that they may fully participate in planning. Respect the experience, knowledge, and history of all people.”

Importance of building trust + relationships

Work with partners

Strategies:

Select a neighborhood, assess context, and propose a planning + engagement process that is intentional in reaching underrepresented

Analyze + present on best practices for engaging key groups – immigrants, youth, renters, persons with disabilities… - create a guide for planners
Integrate Technology

Do all of the other pieces first

Use technology if it can add value

Account for access

Strategies:

Review an online engagement tool, assess for usability, access, etc.

Engage a planner panel to discuss how they use input from participatory technology or online engagement, how it differs from other methods
Professional, communication and leadership skills.

Justin Hollander, PhD, FAICP
Communicating More Clearly

WHAT WE THINK THEY WANT

• I want my audience to understand their risks.

• I must include plenty of data to back up my points.

• I must include every detail.

• I must be highly precise and use technical terms.

WHAT THEY REALLY NEED

Is this information relevant to me? Why should I care?

There are a lot of numbers here. What do they mean?

Tell me what is most important now, and where I can follow up for details.

There is a lot of jargon here I do not understand.

Source: Jack Heide, AICP, CFM (FEMA), 2023 APA Conference
Who are stakeholders?

- Internal/External Audiences
- Questions to think about:
  - Who will this affect?
  - Who should be involved?
  - Whose support do we need?
  - Who needs to know/understand?
- Who else should we consider?

Source: Jack Heide, AICP, CFM (FEMA), 2023 APA Conference
Practical Tips

- Be interested in other people. Ask questions and listen.
- Respect time and show people you value them by following up.
- Consider “what is in it for them.”
- Pause and let people complete their thoughts. Do not interrupt.
- Be present. Put technology away when you are with others.
- Use plain language, examples, stories and analogies.

Source: Jack Heide, AICP, CFM (FEMA), 2023 APA Conference
Leadership

• Moving people forward towards a goal (Gardner 1990);

• Cultivating a team, caring for its members;

• Continuous renewal, avoiding getting stuck in the status quo (Johnson 1998; Gardner 1990)

• Motivating others
Professionalism

- Cultural competence (Agyeman and Erickson 2012)
- Executive presence (Hewlett 2014)
- Making deadlines, showing up on-time
- Interrogating the concept of “professionalism” and its origins
Questions?