UPSTREAM MANAGEMENT SOLUTIONS

GOING UPSTREAM NEWSLETTER

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JORDAN'S THOUGHT FOR THE MONTH: *DREAMING & REACHING HIGHER*

One of the (perhaps) positive impacts of the Trump Administration's tariffs on Canadian goods is that it has exposed Canadian export companies' dependency on the US market. We would rather sell our raw materials to the US than refine or manufacture them into higher value goods. Some of this can be attributed to the 10x population and greater market size in the US, or perhaps tax reasons, but some of it can be attributed to a business culture of complacency – why search out foreign markets when we have an easier market to access a few hundred miles away, with the same language? Canadians also have a bad habit of settling for second or third place, instead of striving to be the best at what we do.

There's a paradox that while the US is historically more libertarian when it comes to government interventions, their professions and occupations are regulated by licensing boards in the respective state government, and conversely, Canada, which is more statist or government-friendly, allows for self-regulation by professional bodies (albeit with increasing provincial oversight). Yes, we may have legislative constraints, but sometimes we are guilty of complacency or only making minor, incremental improvements.

At last month's CNAR Annual Convention, one of the keynote speakers, Canadian Olympic champion swimmer Mark Tewksbury spoke a lot about being open to challenging assumptions, new ideas, processes, and ways of thinking. I have seen "small" regulators (in terms of the number of staff) who "punch above their weight class" in pioneering projects and programs and sophistication that really takes regulation to the next level. It's more an issue of imagination, perspective and willpower, not resources that holds us back. Sometimes we need outside viewpoints and perspectives to help us see things that we can't from within our regulator-centric mindset.

To help address this challenge, I just released our third batch of e-learning courses to help regulators jump to the next level (or two) of regulatory performance: *Introduction to Right Touch Regulation* (updated to the 2025 version), *Extending Right Touch Regulation Across Your Regulatory Regime, Policy Intelligence, Upstream Thinking*, and *Creating & Evaluating Strategic Plans.* Each of these courses expand on the current regulatory minima and provide practical solution options for raising the bar by a level (or two), or at least incorporating into your next Strategic Plan's goals.

After completing the e-learning courses, we need to translate the change imperative into tangible actions in the short, medium, and long-term. As a consultant and trainer specializing in the profession regulatory sector, I offer expertise in mapping out these pivotal initial steps post-training. I'm only an email or phone call away to kickstart your organization's next stage journey.

***UPSTREAM ACADEMY*'S NOVEMBER RELEASE OF ON-DEMAND E-LEARNING COURSES**

Last week, I launched our third batch of e-learning courses available on our website:

- In our Regulatory Policy Development series, ***Introduction to "Right Touch Regulation"***, which gives the foundation on the recently updated Right Touch Regulation model of regulatory responses proportionate to harm risks and how it is currently used by profession regulators (Basic);

- ***Extending "Right Touch Regulation"*** throughout your regulatory functions, which presents ways of expanding its use by regulators over registrants' careers (Intermediate)

- ***Policy Intelligence***, which presents techniques to better identify emerging policy issues and trends and to incorporate them into the policy development process (Advanced) and

- ***"Upstream" Problem Solving***, which presents a preventative, system mindset and creative ways of preventing harm through targeted earlier interventions (Advanced)

- In our Strategy series, ***Evaluating and Updating Strategic Plans***, which provides methods for critical evaluation of current strategic plans, updating, or when to start afresh, and adding agility to address changing environments (Intermediate)

I'm really excited to be presenting these courses you won't find anywhere else, as they are customized for profession regulatory bodies. **Upstream Academy** courses are ideal for onboarding new staff or supporting their personal training and development, with content that is practical and customized for regulatory bodies. A certificate will be provided for completing each course. Basic courses are $50, Intermediate level $100, and Advanced level $150 (HST included). To register go to www.upstreammanagesolutions.com/training.

If you would prefer to have a learning experience for a group of 3 or more, using case studies, we can provide that onsite at your offices or remotely by Zoom. Please contact me for pricing and to discuss your training needs, within your budget.

Interested in learning more or have an idea for a training course? Give us a call (416-880-0353) or email jordan@upstreammanagesolutions.com.

WHEN WILL YOU GET AROUND TO IT?

Have you been waiting for a 'Round Tuit' to finally tackle that next policy or strategy project by year's end? Don't have the resources to take off other projects, to hire a full-time policy or strategy analyst, or the dollar cost is below the RFP threshold? Or do you want to "level up" to larger regulators?

We specialize in targeted consulting for regulatory bodies, delivering focused policy analysis and strategic planning for your small-scale projects. We go "upstream" to the core issue, providing innovative, durable solutions that measurably improve regulatory performance. Now is the ideal time to get that project started. Give us a call or email to explore your options.

COMING THIS WINTER - *UPSTREAM* PODCASTS

In 2026, I'll be adding **regular podcasts** with interviews and discussions with Registrars, CEOs and staff who are creating or managing new regulatory initiatives or to discuss emerging topics and ideas. **I would love to host you on one of these podcasts, either through zoom or an in-person recording at your offices. Or alternatively, you can suggest a topic to discuss.** Send an email to Jordan@upstreammanagesolutions.com and let's talk.

WE WANT YOUR FEEDBACK!

Is this newsletter helpful to you? Drop us a line at jordan@upstreammanagesolutions.com to give me your feedback about what you like, hate, find "meh", or topics or questions would like to see covered in future monthly editions.

ABOUT UPSTREAM MANAGEMENT SOLUTIONS

We're a boutique management and training consultancy, offering five PULSE pillars of consulting and training excellence, experience, and expertise for the public sector:

- **P**olicy Research, Development & Analysis

- **U**ser Experience/Human Centered Design

- **L**earning & Development

- **S**trategy/Strategic Planning, and

- **E**ngaging Stakeholders & Partners

We help broader public sector organizations to achieve their mandates by solving their toughest challenges by going "upstream" to the source, instead of focusing on symptoms. We provide reviews, environmental scans, analysis, advice, reports, and plans, as well as "in-house" and on-demand training for staff and volunteers. UMS specializes in advising and training:

- Federal, provincial and municipal governments

- Profession-regulating and other regulatory bodies

- Hospitals, universities and colleges

- Agencies and special purpose bodies

- Member associations, and

- Non-profit organizations.

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