



Planning and Building Department

TO: Development and Infrastructure Committee

SUBJECT: Official Plan Review: Revised Comprehensive Work Plan, Schedule and Budget Allocation

Report Number: PB-89-13

File Number: 505-08

Report Date: November 14, 2013

Wards Affected: 1 2 3 4 5 6 All

Date to Committee: December 2, 2013

Date to Council: December 9, 2013

Recommendation: Endorse the *Revised Official Plan Review Comprehensive Work Plan and Schedule (November 2013)* as contained in Appendix A of planning and building department report PB-89-13; and

Direct the Director of Planning and Building to execute the proposed *Revised Official Plan Review Comprehensive Work Plan and Schedule (November 2013)* as contained in Appendix A of planning and building department report PB-89-13; and

Endorse the revised budget allocation within the approved 2013 Capital Budget for the Official Plan Review project, as contained in *Table No. 1 – Official Plan Review Revised Budget Allocation and Funding* of planning and building development report PB-89-13.

Purpose:

- Address goal or action in strategic plan
- Establish new or revised policy or service standard
- Respond to legislation
- Respond to staff direction
- Address other area of responsibility

The purpose of this report is to:

- provide a progress update on the Official Plan Review;
 - identify shifts in project scope, timing and budget;
 - identify key project management considerations; and,
 - recommend a revised Official Plan Review work plan, budget allocation and schedule.
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Reference to Strategic Plan:

- | | |
|--|--|
| <input checked="" type="checkbox"/> Vibrant Neighbourhoods | <input checked="" type="checkbox"/> Prosperity |
| <input checked="" type="checkbox"/> Excellence in Government | <input type="checkbox"/> N/A |

1.0 Background: Planning and Building staff is currently conducting an Official Plan Review (OPR) for the City of Burlington Official Plan (OP). The previous OPR was launched in 2002. The resulting amendment to the Plan was adopted by the City in 2006, and approved by the Region of Halton in 2008 (Official Plan Amendment No. 55). The *Planning Act* requires that the OP be reviewed no later than every five years from the date that the OP is in force and in effect.

The City opted for a “head start” on the review by commencing with the employment lands background study in 2010. Scoping of issues to be examined as part of the OPR also began in 2011 and in September 2012, the Comprehensive Work Plan was approved by Council (Staff report PB-53-12). Approval of the work plan was the “full-launch” of the OPR, enabling the research, analysis, policy development, agency consultation, and the public and stakeholder communication and engagement program to commence.

There are three pertinent Council Resolutions related to the initial project set up. These were issued along with three related staff reports that were brought forward for Council approval (refer to *Appendix B – OPR Work Program by Phase*, dated August 2012, for details of the three Official Plan Review phases, as approved in the 2012 Comprehensive Work Plan). These reports were important components of Phase I, “Gearing-Up” of the OPR which was to determine the:

- range of planning issues to be examined as part of the OPR;
- specific work plans to address these issues;
- timing of executing the work plans; and,
- cost of the individual projects and of the comprehensive OPR project.

The Council resolutions related to these reports are presented in chronological order below:

December 19, 2011 (Staff Report PB-87-11: Introduction to the 2012 Official Plan Review)

Endorse the proposed process for the 2012 official plan review contained in Appendix B of planning and building department report PB-87-11-1; and

Endorse option #3 proposed in planning and building report PB-87-11-1 such that the official plan and zoning by-law reviews will be undertaken simultaneously, subject to the 2012 Capital Budget approval; and

Direct the Director of Planning and Building to engage the Burlington community in the 'external scan' included in the 2012 Official Plan Review; and

Direct the Director of Planning and Building to report back with a scope proposal and a proposed engagement strategy for further consideration by Council, it being understood that the respective proposals will indicate at a conceptual level the required linkages between the official plan review and the zoning by-law review.(PB-87-11-1)

July 3, 2012 (Staff Report PB-44-12: Official Plan Review: Proposed Scope of Work)

Receive a summary of the external and internal scan of the Official Plan; and

Endorse the general project scope proposed in this report for the 2012 Official Plan Review, with the understanding that emerging or unanticipated circumstances will be reported to City Council and will be subject to further consideration with respect to resource and time requirements; and

Direct the Director of Planning and Building to develop an overall work plan for the Official Plan Review, such work plan to outline the overall time, resources, topic linkages and communication and public engagement approaches required to address the proposed scope of the review.

Direct the Director of Planning and Building to move ahead as soon as possible with discussions with the public regarding issues related to the lot patterns at Indian Point and Roseland. (PB-44-12-1)

September 4, 2012 (Staff Report PB-53-12: 2012 Official Plan Review: Comprehensive Work plan)

Endorse 'Option A' work plan and engagement plan for the Official Plan Review contained in Appendix O of planning and building report PB-53-12-1, with the understanding that emerging or unanticipated circumstances will be reported to City Council and will be subject to further consideration with respect to resource and time requirements, and with the understanding that meeting the timelines contained in the work plan will require project-specific protocols for outsource procurement: and,

Direct the Director of Planning and Building to include an additional \$260,000 as part of the 2013 proposed capital budget and forecast, to fulfill the requirements of Option A; and

Direct the Director of Planning and Building to execute the attached work plans in Appendices D through N and the engagement plan in Appendix O, of planning and building department report PB-53-12-1, dated August 10, 2012; and

Direct the Director of Planning and Building to review the Official Plan policies and zoning of the lands in the Bridgeview area and report back by the 1st quarter of 2013. (PB-53-12-1) [Emphasis Added]

2.0 Discussion:

The 2012 Comprehensive Work Plan Report detailed the work plans for the city-wide, ward-specific and technical policy issues (refer to Staff report PB-87-11). Each work plan has its own public and stakeholder consultation plan. In addition, the OPR is supported by a broader public consultation plan addressing the project comprehensively.

The OPR has been proceeding in accordance with the approved work plan since September 2012. Given that more than a year has passed since the Comprehensive Work Plan was approved, and that there have been a number of resource and scope shifts that have occurred to date, it is timely to provide an update to Council regarding:

- the status of the various components of the OPR;
- key assumptions, risks and other project management considerations that relate to the OPR; and,
- a revised strategy to implement the OPR project plan.

2.1 Project Update

In the project update provided below, staff has identified work plans that either have experienced some shift in project scope, or additional items to the OPR not originally identified in the approved 2012 Comprehensive Work Plan. The other components of the OPR that have generally remained constant to the approved 2012 Comprehensive Work Plan are not discussed in this report.

Employment Lands Study (ELS)

Purpose:

The employment land studies are an important component of the City's land budgeting exercises in which land supply and demand from projected growth is analyzed. The purpose of the Phase I ELS prepared by the consortium of Metropolitan Knowledge Incorporated (MKI and MMM Group Ltd) was to:

- analyze trends in employment uses in southern Ontario and the implications for demand for employment land;
- update the supply of vacant, developable employment lands;
- calculate the demand for employment land to the planning horizon of 2031 and having regard for the targets established under the Provincial Growth Plan; and
- present strategies and options for the City to meet growth objectives.

The purpose of the Phase 2 ELS prepared by Dillon Consulting and Watson & Associates was to:

- build on the understanding developed through the findings of the Employment Lands Study, 2011 (MKI & MMM);
- develop a more detailed understanding of the vacant employment lands identified through Phase 1 and their characteristics, including their availability for development;
- present a best practices review of municipal approaches to Institutional Uses in Employment Areas to address a Staff Direction regarding Places of Worship from March 2011.
- identify opportunities and issues for Employment Lands throughout the City; and,
- provide Council with strategic directions to inform policy development for Employment Lands throughout the City.

Status:

The Phase 1 ELS (MKI & MMM) study has been complete since 2011, and the Phase 2 ELS (Dillon & Watson & Associates) is in its final phase. To date, three staff reports have been prepared related to employment lands:

- Employment Lands Study (PB-37-11) to Council on July 4, 2011 transmitted the Phase 1 ELS to Council.
- Draft Employment Lands Study, Phase 2 (PB-101-12) to Council on December 10, 2012 transmitted the Draft Phase 2 ELS for consultation.
- Official Plan Review: Directions Report on the Draft Employment Land Conversion Policies; and, Proposed Strategic Assessment of Vacant Employment Land Inventory (PB-1713) to Council on January 28, 2013 which presented draft employment land conversion policies and the identification of work related to strategic assessment of the vacant land inventory.

Scope Shift:

The key shifts in original scope are a result of:

- Direction to complete Phase 2 of the ELS as directed by Council (July 18, 2011);
- The scope of the Phase 2 ELS was modified to include:
 - Public Consultation
 - Servicing Assessment to gain a better understanding of serviceability of the vacant parcels
 - Additional effort to coordinate with the Burlington Economic Development Corporation (BEDC) Employment Lands Operational Plan
 - Further work to ensure consideration of assumptions used through the Phase 1 ELS through to the findings of the Phase 2 ELS.

- Direction to conduct a strategic vacant land assessment (December 10, 2013 (PB-17-13-1);

Impacts of these shifts have included the allocation of significant staff time and additional costs related to outsourced assistance. These additional costs amount to \$32,000 and are identified in *Table No. 1 – OPR Revised Budget Allocation and Funding* of this report.

Next steps:

A staff report is scheduled for Q1 2014 which will: transmit the Phase 2 ELS report; recommend draft conversion application process; and report on the findings of the strategic vacant land assessment. Subject to approval, City staff will commence considering all employment land conversion inquiries received to date and other conversion opportunities determined by the City.

Commercial Strategy Study

Purpose:

The purpose of the Study is to conduct a land budgeting analysis, in addition to obtaining guidance on integrating commercial land use planning with neighbourhood planning and urban design to assist in the transformation of commercial areas as the City approaches build-out.

Status:

Phase I of the Commercial Study is complete which included the following deliverables: *Commercial Market Supply and Demand Analysis; Commercial Policy & Design Review Background Report; and Interim Commercial Strategy Discussion Paper: Downtown Burlington.*

The engagement process to date involved:

- an online forum targeted at the public-at-large and the business community from June to September, 2013,
- two stakeholder sessions on September 12, 2013 to receive feedback on the study findings and strategic considerations,
- two meetings with representatives from the motor vehicle dealership industry, and
- one meeting with representatives from Mapleview Mall.

The consulting team, urbanMetrics and The Planning Partnership, are in the final stages of completing Phases 2 and 3 of the Study bringing the project to completion.

Scope Shift:

A minor shift in scope has occurred as a result of additional attention required to address motor vehicle sales, leasing and rental land uses as part of the Study. The shift has resulted in some additional cost to support outsourced resources,

as identified in Table No. 1.

Next Steps:

The consulting team will submit Phase 2: *Strategic Commercial Policy and Design Recommendations Draft Report*, and Phase 3: *Urban Design Guidelines for Commercial Lands Draft Report* in Q4 2013. Staff reports are scheduled for Q1 2014 which will transmit the consultant's study and findings (Phases 2 and 3 of the study); and recommend key policy directions related to commercial lands.

Mobility Hubs Opportunity and Constraints Study

Purpose:

The purpose of the study is to use the Provincial Mobility Hub Guidelines to address the opportunities and constraints present at the two provincially identified mobility hubs (Burlington GO and Downtown Burlington) as well as the City identified hubs of Aldershot GO and Appleby GO. The system of major transit nodes in the City will be considered and their connectors analyzed.

The study ultimately will inform the integration of the mobility hub lens into the Official Plan in a number of ways including the development of Official Plan policies and amendments to the City's urban structure to identify Mobility Hubs, the development of high level urban design principles, the identification of the role and vision for each Mobility Hub and the various connectors (the City-wide system), guidance on key master planning considerations and recommendations regarding implementation tools and approaches.

Status:

The project is currently in Phase II (C): Mobility Hub Visioning and Urban Design Principles. Engagement related to this study has incorporated an agency workshop as well as public workshop to discuss and confirm identified opportunities and constraints within each of the mobility hubs.

Scope Shift:

A shift in scope has occurred to facilitate the consideration of the Minutes of Settlement between the City and Paletta International Corporation (PIC) related to lands adjacent to Aldershot GO into the scope of the Mobility Hubs Opportunity and Constraints Study. The Mobility Hubs Opportunity and Constraints Study Terms of Reference acknowledged PIC's lands as a key consideration however, anticipated that some of the planning for those lands would occur as part of a future master planning study. A portion of that work has now shifted into the current Mobility Hubs study. To date, OPR funds have been used to support discussions however there is opportunity in the future to recover a portion of the costs as per conditions of the Minutes of Settlement.

Next Steps:

A second public workshop will proceed in early 2014 to share the findings of consultation and background analysis as well as to share draft policy recommendations and implementation.

Character Study for Roseland and Indian Point

Purpose:

The purpose of the Study is to identify and define the character area components of Indian Point and Roseland and to develop policy and implementation tools to manage neighbourhood change.

Status:

The Study was initiated in March 2013 and is currently in progress. Two neighbourhood meetings have been held for each neighbourhood.

Scope Shift:

A minor shift in scope has occurred as a result of the introduction of an additional working committee meeting for each neighbourhood to provide an opportunity for additional consultation with stakeholders. The shift has resulted in some additional cost to support outsourced resources (Brook McIlroy).

Next Steps:

The study team is preparing for a working committee meeting to be held in each neighbourhood by January 2014 followed by a final neighbourhood meeting for each neighbourhood to be held in Q1 2014. Upon completion of the Study, a staff report will be prepared to transmit the findings of the Character Area Study report and recommend policy and implementation tools for each neighbourhood.

Old Lakeshore Road

Purpose:

The purpose of the Study is to explore opportunities and constraints in achieving the vision for the OLR Mixed Use Precinct as articulated in the Official Plan by investigating potential for:

- Acquiring public waterfront assets;
- Pedestrian linkages between the downtown and waterfront;
- Consistency of public realm urban design features between OLR and the downtown; modifications to the City's existing development application review process to obtain urban design excellence for lands located in the private realm.

Status:

Staff prepared Study terms of reference in response to the staff direction. Upon

Committee/Council consideration of the staff report, the terms of reference were received and filed. The impact of this is that the estimated \$60,000 allocated to this project is available to address new OPR priorities.

Scope Shift: n/a

Next Steps: n/a

Bridgeview

A land use and functional review of land within the community known as Bridgeview is a component of the approved work plan for the OPR. This review was identified as part of the OPR scope via two staff directions (CD-14-2011; PB-53-12-1).

Since that time, a Planning and Building Department staff report was prepared to detail a proposed work plan to address the staff directions. The report is forthcoming pending further discussions between Senior Management and the Region regarding related policy issues which require resolution prior to commencement of the Bridgeview review.

Preliminary Study of the Character and Heritage of the Mount Nemo Plateau

Purpose:

The purpose of the Study is to provide a preliminary examination of the character and heritage issues on the Mount Nemo Plateau by:

- conducting an assessment of the character and heritage of the Mount Nemo Plateau;
- identifying options for the long-term conservation and enhancement of the character and heritage value of Mount Nemo; and
- recommending any further study that may be required to better understand the character and heritage of the Mount Nemo Plateau and how it may be conserved and enhanced.

Status:

This project was initiated by Council direction of July 2, 2013. The Preliminary Study of Mount Nemo is currently in progress with the assistance of outsourced resources.

Scope Shift:

This study was not originally identified as part of the 2012 Comprehensive Work Plan report and as such, a reallocation of funds in the OPR Capital Budget account is required to accommodate this additional item to the work plan and has been identified as a new OPR item in Table No. 1 of this report.

Next Steps:

A staff report is scheduled for January, 2014 Development and Infrastructure meeting which will transmit the findings of the Study. One component of the Preliminary Study is to identify various planning tools to manage the character and heritage value of Mount Nemo. Any implementation of these tools or further study of Mount Nemo on the basis of the recommendations of the Preliminary Study is currently unfunded and any further study would warrant the preparation of a terms of reference and estimation of study cost for Council approval. Staff has provided this note to provide an awareness of potential significant financial and staff resource impact.

Rural and Natural Heritage Work Plan

Purpose:

The purpose of the study is to consider how the existing policies and vision relating to Rural and Natural Heritage could be revised to articulate the City's current objectives by:

- Reviewing the existing vision for the Rural Area;
- Ensuring conformity of rural and natural heritage policies with Regional and Provincial plans; and
- Carrying out a scoped best practice review to enhance existing sustainability policies in the Official Plan.

Status:

The Rural and Natural Heritage work plan can be considered to have two components: i) rural and natural heritage policies and ii) sustainability policies.

- i) Rural and Natural Heritage: A background report was prepared in January 2013 to present background information to the public regarding the Rural Area of Burlington. The Rural Summit was held on January 19, 2013, followed by a summary report to Council of the comments received at the Rural Summit. Preparation of draft policy directions, subject to change, is underway.
- ii) Sustainability: Best practice review and stakeholder consultation are in progress to enhance existing sustainability policies in the Official Plan. Preparation of draft policy directions is underway.

Scope Shift:

The original work plan for the Rural and Natural Heritage topic area stated that new policies related to the Regional Official Plan Amendment 38 (ROPA 38) would not be incorporated into the Official Plan Review. This was because the timing of the ROPA hearing was unknown at the time and would have likely not occurred during the course of the OPR. However, given the revised delivery

target of the OPR as described below in Section 2.4 of this report, and that the OMB hearing is occurring within the revised timeframe of the OPR, there has been a shift in scope to complete a policy conformity exercise to ROPA 38. The conformity exercise involves several significant policy changes, including but not limited to: the enhancement of the existing Natural Heritage policies and mapping in line with the Region's Natural Heritage System and associated policies, a new prime agricultural policy constraint/designation, additional policies related to aggregate extraction, and incorporation of Greenbelt Plan policies.

Additional time and staff resources will be required for this exercise for the following reasons:

- Through the ROPA 38 hearing process at the Ontario Municipal Board, policies in ROPA 38 may evolve. Staff time will be required to monitor and provide input on the changing ROPA 38 policies, and to make corresponding changes to the City's policy directions. Although draft policy directions can be prepared prior to a decision on ROPA 38, they must remain open to alteration based on the outcome of ROPA 38.
- The *Planning Act* requires that local municipalities' Official Plans and Zoning By-Laws be amended to conform to regional and provincial policies. The local plan can be more restrictive than the Regional plan but the overall direction and long term objectives of the local plan must conform to the Regional plan. Therefore, each of the applicable policy changes in ROPA 38 must be considered carefully by the City to determine how they should be translated into the Burlington Official Plan.
- Additional public, agency and stakeholder consultation will be required to inform the public about ROPA 38 directions and to receive feedback on the proposed policies to conform to ROPA 38.

Next Steps:

- Continue to work on sustainability directions report, targeted for Q1 2015.
- Monitor the ROPA 38 hearing, consider comments from Rural Summit, prepare draft policy directions, and continue to engage with public, stakeholders and agencies prior to Ontario Municipal Board decision on ROPA 38. All policy options considered will remain tentative pending the outcome of the ROPA 38 hearing process. Directions report is currently targeted for Q1 2015.

Engagement and Communication Plan

Purpose: The purpose of the Engagement and Communications Work Plan is to identify a program of informing, consulting and collaborating with the public,

stakeholders, interested citizens, businesses and community groups throughout the OPR process.

Status: There has been a significant amount of OPR engagement and communication to date, and there is an ongoing commitment to engage and consult throughout the OPR. A listing of completed initiatives, along with related participation metrics, is provided in *Appendix C – Summary of Public Engagement and Communication To Date*.

Scope Shift: To date, the Official Plan Review has included nearly all of the engagement forms described in the Engagement and Communication Work Plan including:

- Council workshops;
- City-wide and community meetings;
- Focus groups;
- Key stakeholder meetings & workshops;
- Open houses;
- Online engagement;
- Rural Summit;
- Telephone Town Hall;
- Speaker Series;
- Ward meetings; and
- Youth engagement.

Due to implementation challenges, the video contest and “edugaming” activities that originally comprised the youth engagement activities are no longer feasible. The revised youth engagement strategy consists of presentations to and activities with youth at the Leaders-in-Training (LIT) summer camps (completed in August 2013) and as part of the Grade 5 City Hall tours (on-going).

Next Steps:

Public and stakeholder meetings and workshops will be held for specific work plans. Online engagement and Elite email communications will continue throughout the remainder of the Official Plan Review with broader engagement activities anticipated in conjunction with draft policy reports and the statutory public meeting in Phase 3 of the OPR Work Program.

2.2 Resources

Project resources consist of financial and human resources. During Phase I, the project was effectively set up to ensure that financial resources were available to enable the OPR with its individual work plans to proceed without delay. This has served the project well to date.

With respect to human resources however, there have been a number of staffing changes that have had significant impact on the timelines of the various work plans. These staffing changes involved three senior positions, including the loss of the Manager of Policy and Research. The team has been without up to two senior staff members consistently throughout the year. Recruitment for the various full time, backfill and contract positions proceeded efficiently, but has taken the realistic and expected time to manage the staffing transitions. The project team currently remains short staffed by one senior planner, however it is expected that the Policy Section will be at full complement by Spring 2014. Also, Table No. 1, under New Items (Ward and Technical) identifies funds to support the OPR, which includes funds to support a contract planner.

2.3 Key Assumptions, Risks and Other Project Management Considerations

The timing of the delivery of the OPR, like any project, is affected by impacts to scope and resources and is based on a variety of assumptions and risks. Best efforts are made to mitigate influences on the project so that the project proceeds in accordance with the project plan.

Assumptions

Key assumptions in the project include that:

- The OPR project scope remains as presented in the subject report.
- The Policy Section staff continue to provide service to other policy related initiatives (e.g. non-OPR related). However, none of these initiatives require significant and unexpected staff resources.
- Directions reports will be endorsed by Council thereby enabling commencement to the policy development stage, and that additional directions reports or additional work items are minimal.
- All work plans within the comprehensive OPR project cumulate in Q2 of 2015 allowing a window of opportunity to examine all directions and draft policy in a comprehensive manner to ensure alignment among policies.
- No loss of staff complement or issues with outsourced resources emerge.
- Continued funding to support the project.

Timing Considerations and Potential Risks

In terms of impacts to the project timing, the most significant potential risk is the delay of an OMB decision related to the ROPA No. 38 hearing thereby impacting the policy conformity exercise with the Region's OP.

Regarding the scheduling of public meetings and delivery of staff reports, it is important to respect the time period surrounding the upcoming municipal election as well as periods that are not optimal for engaging with the public and stakeholders such as holidays and during the summer months.

Also, with respect to competing demands on staff resources, it is important to note that the Policy Section of the Planning & Building Department has various responsibilities in addition to the OPR. Below is a listing of various past, current or emerging non-OPR policy initiatives:

Provincial Monitoring

- Participated in joint submissions with partner agencies in Halton regarding: Conservation Halton Whitepaper; Draft Provincial Policy Statement (PB-16-13); Places to Grow Amendment 2 (PB-23-13);
- Responsible for review and comment of legislation and policies including: *Endangered Species Act*, Conservation Halton Shoreline Policies, *Great Lakes Protection Act* and Source Water Protection Plans.
- Prepared staff reports PB-32-13 (*Endangered Species Act*), PB-55-13 (ROPA 38 Guidelines), PB-89-12 (Source Water Protection Update).
- Participate in intra-municipal working group on Greenbelt Plan Study and Land Use Planning and Appeal and Development Charges Systems Review.

Region of Halton Official Plan Implementation

- Responsible for coordinating the city's review and comment of the ROPA 38/Regional guidelines and participation in working groups with the Region on the draft Guidelines.

Transportation Master Plan

- Participate on Steering Committee
- Worked collaboratively on Telephone Town Hall

Development Charges Team

- Participated in the preparation of a staff report on the revised growth projections for DC Study.
- Participate as required at various DC Committees (e.g. working groups, strategy committee)

Growth Management Data Monitoring

- Participate as a member of the Region's recently reformed Data Management Working Group.

Legal Matters

- Engage in Legal matters including: ROPA No. 38 Hearing and OPA No. 55 appeals.

Core Commitment (Downtown Vision Project)

- Participated as staff resources in the Downtown Task Group and Council Workshop; supported preparation of staff reports.

Support to City Master Plans and Initiatives

- Provide input to the Community Energy Plan and Trails Master Plan and ensure alignment with OPR.
- Participate in Mayor's Task Force for Sustainable Buildings.

Environmental Impact Assessment Review

- Review and provide comments on Environmental Impact Assessments for ongoing development applications.

2.4 Strategy and Process

Revised Timing

The original project set up of the OPR was estimated to be complete by 2014 prior to the municipal election. However, with several shifts to project scope and staff resourcing matters experienced to date, there has been an impact to the overall project timing. The revised estimate for the delivery of the draft OPR is Q4 2015.

The proposed revised OPR work plan outlines the key elements of the project, describing milestones across the time horizon to Q3/Q4 of 2015 (refer to *Appendix A - Revised Official Plan Review Comprehensive Work Plan and Schedule*). The key elements of the OPR have been grouped into themed policy areas and are listed from Nos. 1-9 in the Schedule. While there is an intricate relationship across all policy areas, the grouping was an effort to bring forward topics for Council consideration in a coordinated manner.

The revised work plan presents a system of reporting to Council comprised of:

- Transmittal reports (reports bringing forward consultant reports).
- Directions reports (reports outlining the fundamental policy shifts to current policy and/or introducing new policy, and recommending endorsement of the directions to enable staff to commence to a policy writing stage; some reports will be based on the findings and recommendations of the consultant reports, others will be based on staff review).
- Draft Policy reports (as warranted).

At the bottom of the table in *Appendix A*, the on-going broader public and stakeholder consultation program is depicted with an arrow across the time horizon.

The table was developed with key project management considerations such as: the upcoming municipal election; periods throughout the year when public consultation should be avoided due to potentially limited availability; duration of the ROPA No. 38 hearing and the related Ontario Municipal Board decision; and continuation of service to other non-OPR policy initiatives. Staff will seek opportunities to bring work items forward in advance of the time schedule whenever possible.

Complementary to *Appendix A – Revised Comprehensive OPR Work Plan and Schedule* is *Appendix B – Revised Work Program by Phase (November 2013)*. This diagram illustrates the phases, key deliverables and Council check in points. The illustration is similar to that previously approved in the 2012 Comprehensive Work Plan; the main difference is that an additional check in point to Council will occur recommending draft policy, prior to the statutory public meeting. (Note: Appendix B contains both the Approved Work Program (August 2012) and the proposed Revised Work Program (November 2013))

Alignment

The 2012 Comprehensive Work Plan report PB-53-12 discussed alignment with other City Council approved plans and initiatives as an important component of the Official Plan Review. Alignment with Council approved directions continues to be a priority, and will occur through individual work plans for the Official Plan Review. Policy staff, in collaboration with staff from the responsible department, will draft policy for inclusion into the draft Official Plan Amendment. Regular communication with staff, in addition to coordinated inter-departmental and agencies meetings are scheduled when warranted to facilitate appropriate communication on the projects.

Topic Relationships within the OPR

The September 2012 Comprehensive Work Plan Report illustrated the relationships of various projects within the OPR. The illustration has been updated as presented in *Appendix D – Topic Relationships within the Official Plan Review*. While the updated relationship map is similar to the one originally presented, there are a few changes as follows:

- Mount Nemo Preliminary Study: Addition of a new box to the diagram to identify this additional study as part of the OPR. This study connects to the Heritage Best Practices Review and the Rural and Natural Heritage work plan. Any potential future study to implement the findings of the Preliminary Study is not anticipated to be within the scope of the OPR.
- Heritage Best Practices Review: Box relocated to connect with Mount Nemo and the Rural Area/Natural Heritage work plan.

- Ward Issues: Addition of two boxes to the diagram to identify the pre-existing staff directions related to the land use review of lands at Highway No. 6 and Plains Road, and at Highway 403 and Waterdown Road.
- Old Lakeshore Rd. Precinct: Removed.
- Transit Master Plan: Long term transit considerations are being considered as part of the Transportation Master Plan and as such is not required to be identified as an independent initiative related to the OPR.
- Parks and Recreation Master Plan: Removed as the master plan is scheduled to commence outside the timeframe of the OPR.

3.0 Financial Matters:

In addition to a revised work plan and schedule, staff is proposing a revised budget allocation and funding. Table No. 1 below identifies the approved budget, revised budget and variances related to Official Plan Review (OPR) (capital order OP0009) and Zoning By-law Review (ZBR) (capital order OP0010), as well as identified the additional funding required for Employment Lands Study (capital order OP0008).

In summary, Table No. 1 identifies that:

- For the currently approved OPR project, the revised budget represents a decrease to the 2012 approved budget of \$48,750;
- outside the OPR, additional funding is required for prior approved Employment Lands Study in the amount of \$32,000;
- for new work items the revised budget represents an increase of \$241,000;
- the net increase to the budget, including the increase to the previously approved Employment Land Study work item, is \$224,250;
- the increase can be accommodated through a transfer of funds from the Zoning By-law Review account (OP0010) to the OPR account (OP0009) with no impact to the comprehensive funding envelope of \$1.06 million for the OPR and ZBR at this time;
- In 2015, additional funding will be required for the Zoning By-Law Review.

The variance column within the “Project Work Items” portion of the Table No. 1 identifies the additional costs related to:

- preapproved work items;
- removal of a work item (Old Lakeshore Road);
- new work items.

The new work items include: the Preliminary Study of the Character and Heritage of Mount Nemo; a category to capture additional resources to support contract staff and consultant support related to the Ward and Technical work plan; and an item for an environmental peer review related to the Mobility Hub Study.

The variance column within the "Funding" portion of the Table No. 1 identifies the financial impact to the ZBR account (OP0010) of \$224,250.

Total Financial Impact

As part of the 2013 Capital Budget process, Council approved 1.06 million of which \$660,000 was identified for the OPR and \$400,000 was identified for the Zoning By-law Review (ZBR). The revised total for the OPR project is \$884,250 representing an increase of \$224,250 to the \$660,000 previously approved, of which the amount can be funded through the approved Capital Budget for the ZBR project. Commencement of the Zoning By-law Review is deferred until the completion of the OPR and as such, prior funding for the ZBR can be repurposed to augment the funding required as stated above.

It is important to note that there will be a financial impact related to the 2015 Capital Budget process in which additional funds will be required to support the commencement of the Zoning By-law Review, subject to Council approval.

Also, for any additional work to implement the recommendations of any of the OPR studies or to conduct any further study that Council may direct, additional funding will be required.

Table No. 1 - Official Plan Review Revised Budget Allocation and Funding

Project Work Items	Approved Budget	Revised Budget	Variance
Official Plan Review (OPR) (OP0009)			
Currently Approved Items			
Commercial Strategy Study	\$ 175,000	\$ 176,150	\$ 1,150
Character Area Study	\$ 70,000	\$ 74,100	\$ 4,100
Mobility Hubs Study	\$ 120,000	\$ 126,000	\$ 6,000
Ward & Technical	\$ 75,000	\$ 75,000	\$ -
Old Lakeshore Road Engagement and Communication	\$ 60,000	\$ -	\$ (60,000)
	\$ 160,000	\$ 160,000	\$ -
Sub-total	\$ 660,000	\$ 611,250	\$ (48,750)
New Items			
Mount Nemo Preliminary Study		\$ 50,000	\$ 50,000
Ward & Technical (Funds to support contract planner salary and as a contingency reserve for consultant support)		\$ 176,000	\$ 176,000
Environmental Peer Review (Mobility Hubs)		\$ 15,000	\$ 15,000
Sub-total		\$ 241,000	\$ 241,000
Total Official Plan Review (OPR)	\$ 660,000	\$ 852,250	\$ 192,250
Increase to prior approved Employment Lands Study (ELS) (OP0008)		\$ 32,000	\$ 32,000
Total Official Plan Review (OPR) (including ELS funding increase)	\$ 660,000	\$ 884,250	\$ 224,250

Funding	Approved Budget	Revised Budget*	Variance
Zoning By-Law Review (ZBR) (OP0010)	\$ 400,000	\$ 175,750	\$ (224,250)

*In 2015, additional funding will be required to support the Zoning By-Law Review

4.0 Communication Matters:

The approved Comprehensive Work Plan was developed to include a variety of engagement and communication techniques that extend well beyond the requirements of the *Planning Act* in order to improve access to the OPR process and obtain feedback on the project. These communication and engagement forms are described in Section 2.1 above. Six key objectives that were outlined in the work plan, are simplified below:

- To build community awareness.
- To deliver a meaningful engagement process.
- To have the outcome the engagement efforts provide a positive contribution to council decision making.
- To work collaboratively with community partners.
- To encourage the participation of residents not typically involved or represented.
- To create a buzz.

Council's approval of this work plan allowed for new thinking about how to build awareness and welcome input into a complicated City project. Efforts like the Official Plan Review video have offered a chance to connect in a clear and open manner about the role of the Official Plan and the importance of the review. The different approaches including a focus on youth, new technologies, and collaborating with other City projects has helped build recognition of the project and the importance of reflecting on the long term vision and plan for the City.

For a review of the engagement and communication initiatives completed date, refer to Appendix C.

5.0 Conclusion:

Staff recommend approval of the proposed Revised Official Plan Review Comprehensive Work Plan and Schedule (November 2013) and the revised budget allocation within the approved 2013 Capital Budget for the OPR project. The revised work plan considers a number of project management considerations and schedules delivery of the Official Plan Amendment in Q3/Q4 of 2015.

Respectfully submitted,

Signed by Andrea Smith

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