



Planning and Building Department

TO: Community Development Committee

SUBJECT: 2012 Official Plan Review: Comprehensive Work Plan

Report Number: PB-53-12

File Number(s): 505-08

Report Date: July 30, 2012

Ward(s) Affected: 1 2 3 4 5 6 All

Date to Committee: August 27, 2012

Date to Council: September 4, 2012

Recommendation: ENDORSE the 'Option A' work plan and engagement plan (Appendix O) for the Official Plan Review contained in report PB-53-12, 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.

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 be subject to council approval of the 2013 capital budget.

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, dated August 10, 2012.

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
-

Reference to Strategic Plan:

- Vibrant Neighbourhoods
- Prosperity
- Excellence in Government
- N/A

As the Official Plan is a foundation planning document, the review will provide a framework for sound city building decisions by council.

The Official Plan Review will support the creation of more vibrant neighbourhoods by investigating opportunities to enhance policies which support the creation of complete and healthy communities.

The Official Plan Review will ensure that Official Plan policy provides for a range and mix of housing, employment, open space and commercial opportunities to meet the needs of residents throughout their lives.

The Official Plan Review will also create opportunities for public involvement which will contribute to the development of policies which support the long term prosperity of the city.

Background:

Council has been presented a number of reports related to the Official Plan Review.

The initial report (PB-87-11) regarding the Official Plan Review was presented in December 2011. The report introduced the Official Plan Review process and set out the overall process by which staff would undertake the review. The report can be accessed at: <http://cms.burlington.ca/AssetFactory.aspx?did=19478>

In May 2012 a report (PB-38-12) was presented in association with the special meeting of council which included an overview of the issues that, at that time, had emerged as part of the internal and external scan. The report can be accessed at: <http://cms.burlington.ca/AssetFactory.aspx?did=20964>

In June, a report (PB-44-12) was presented with a proposed scope of work for the Official Plan Review. The report presented the findings of the internal and external scan and proposed a means of organizing the elements of the review. The report can be accessed at: <http://cms.burlington.ca/AssetFactory.aspx?did=21500>

Discussion:**Official Plan**

The Official Plan is a policy document that sets out the city's land use objectives and directions for growth and development for the next 20 years. It identifies land uses, the locations and densities of those uses, as well as urban design and built form issues to be considered in the decision making process. The Official Plan sets out council's policies to achieve the vision. It includes policy directions related to many aspects of the city including transportation, infrastructure, natural environment, housing, heritage, open space, the downtown, as well as important social and economic considerations.

One of the most important roles of the Official Plan is to help the city to understand and manage change and to meet our various community commitments. The plan also describes the tools and programs that will aid council in the implementation of the plan.

The Official Plan has legal status and derives authority from the *Planning Act* which outlines the base requirements of an official plan. The Official Plan is the key policy tool which permits the city to demonstrate regard to matters of provincial interest and align with the policies of the Regional Municipality of Halton. All municipal public works and by-laws must conform to the Official Plan and the City's Official Plan must conform with the Region of Halton's Official Plan and provincial plans and policies.

The Official Plan is developed through planning analysis, research, interdisciplinary collaboration, dialogue within the city, with external stakeholders, and with the public.

The city has commenced its five-year review of the Official Plan. In order to get to this point, the city has undertaken an effort to collect input from internal and external stakeholders in the wider community in order to determine what has been working well in the existing Official Plan and what needs improvement.

Purpose of the Work Plan Report

The five year review of the Official Plan is a major undertaking. Care has been taken to define the scope of the review based on the findings of the internal and external scan so as to:

- identify the resources that will be required
- propose the appropriate communication and engagement approaches
- establish a realistic understanding of the time which will be required to complete the project.

To that end City Council has endorsed a process for the 2012 Official Plan Review to secure the step-wise consideration of each of scope, resources, and time for the project as indicated in Appendix A: Official Plan Review Work Program by Phase. Council has now had the opportunity to consider and approve the scope of the review. The findings presented in the scope report and echoed here continue to suggest that there are many areas of the existing Official Plan which have been functioning well and should be maintained.

The purpose of this report is to illustrate our understanding of the relationships among the content of work plans, timing, and their connections to other studies and city initiatives. The report provides a framework for the consideration of the Official Plan Review scope within the proposed timeline. The work plan report will:

- Confirm the scope of the review.
- Present the eleven work plans including their purpose, background, issues, approach, respective communication/engagement elements, decision points, and resources including outsource requirements.

- Discuss alignment with city plans and strategies and alignment with agency, regional and provincial plans and strategies.
- Propose a means to move forward within these timelines

A decision by City Council will be required to endorse the work plan, the approach for hiring the specified outsource requirements, and the general overall timing as demonstrated in Appendix C. Agreement on the general approach and timing will mitigate any identified potential risks to completion within the timelines proposed.

Confirm the Scope

In July, Council was presented with the issues which had been identified in the internal and external scan. The issues list presented in the scope report reflected comments that had been received to date and was organized by type of effort (city-wide, ward and technical). The scope report presented Council with a more complete sense of the work required to complete the Official Plan Review.

Through the public process of confirming the scope and through the process of developing individual work plans our understanding of the approach required for a number of issues has been continuously refined.

Insights developed through the Public Process

During the public process additional submissions from a number of advisory committees were received by Council and have led to a number of changes. These items including developing a revised vision for the city, and the specific issues of heritage and waterfront are reflected in the various work plans presented in this report. In support of these refinements staff will continue to involve Council's advisory committees as well as the public in shaping the final Official Plan Amendment.

In addition the scope report recommendation was amended and approved by Council to advance the initiation of the two area-specific studies which had previously been captured within the Neighbourhoods topic area. The Roseland and Indian Point exercises will be standalone studies independent but supportive to the neighbourhood work plan proposed as part of the Official Plan Review. The findings of these individual studies will be incorporated in the draft Official Plan amendment proposed to be released for public consultation in early 2014.

Insights through the development of detailed work plans

The detailed work planning stage has provided an opportunity to investigate the relationships among the various issues identified in the scope report. The development of the detailed work plans has revealed that while the majority of city wide issues are captured in the various work plans a number of issues will be addressed in the upcoming policy evaluation framework report. Considerations such as healthy

communities, place making and design, sustainability, and complete communities will all be applied to the review as lenses for policy evaluation.

In the development of the work plan it was determined that studies which will contribute to the Official Plan Review but that are currently underway (Employment Lands Study, Commercial Strategy Study) have not been included in work plans. As studies are completed they will be presented publicly with an accompanying staff report presenting directions for incorporation into the Official Plan Review. The relationship to the work plans and the overall vision for the Official Plan Review are demonstrated in Appendix B. The figure identifies those studies and the opportunities to apply the findings of those studies to contribute to other work plans and ultimately to the Official Plan Vision.

The development of the individual work plans have identified a number of works plans which benefit from a work plan presented in stages. The work plans for neighbourhoods, heritage, and waterfront are structured in a way to further our understanding of the issue prior to committing to an approach. The staging of the work will allow for the development of directions informed through the findings of engagement and research. The directions will vary for each work plan but could for example propose further engagement, a more detailed study, no change to existing policy, or simply direct the findings of the first stage to the policy development phase of the overall Official Plan work plan (see Appendix C).

Through the development of detailed work plans it has also become clear that a number of the issues which had been previously categorized as ward issues have shifted into the technical issues list. In all cases these are issues related to ongoing processes separate from the Official Plan Review, but have been recognized as having potential Official Plan policy implications. The following issues are now recognized as alignment issues and are housed in the technical work plan:

- Site Plan Control for Single Detached Dwellings
- Beachway Park
- Education Hub
- Tremaine and Dundas Secondary Plan
- Cootes to Escarpment
- Waterdown Road

Work Plans

Staff have prepared 11 specific work plans (Appendices D through N) and an engagement work plan (Appendix O) demonstrating how the work proposed in PB-44-12 will be addressed. The work plans can be divided into 'areas of transformation' work plans and other more evolutionary 'ward and technical issues' work plans. As was noted in the scope report, not every issue has its own work plan as many issues have been 'bundled' under broader topic headings.

Relationships

Detailed work planning was a critical step required to demonstrate the relationships among work plans. By concretely describing those critical relationships the work plan can reduce duplication of effort and share opportunities for engagement to make most efficient use of engagement opportunities and staff time. While all areas of the review are related it is important to demonstrate the relationships which will drive the engagement approach.

Appendix B provides an overview of all of the work plans and their relationships to other upcoming city initiatives, staff directions, and studies. This diagram indicates the relationships among the various elements and how each contributes to the development of a revised Official Plan vision.

Appendix C shows the timing of various efforts and the relationships among work plans across the project timeline. For a more detailed understanding of the relationships please review the individual work plans.

Structure of work plans

Appendices D through N include the individual work plans developed by the policy team. Each work plan includes the following sections:

- Purpose: *the goal of the work plan*
- Background: *a brief discussion of the issue*
- Issues Identification: *a list of the key questions/inquiries*
- Approach: *the approach for consideration*
- Timeline: *where appropriate an individual timeline including major milestones*
- Public Engagement: *identification of public engagement opportunities*
- Resources: *an estimate of the cost of the components of the work plan*
- Deliverables: *a list of the key deliverables*

Appendix C presents a timeline of the major elements described in individual work plans and acts as a general overview of the proposed process.

While each work plan establishes its own approach, all work plans can be generalized to include: background research, consultation with selected stakeholders and the public contributing to the development of directions or a preferred approach. In every case, regardless of there being a Directions Report to Council the outcome of all of the work plans are revised policy released in the draft Official Plan amendment.

The Official Plan Review finds its foundation in the statutory requirements of an Official Plan Review exercise as required by the *Planning Act* and in the accountability structure developed to formalize relationships. Actions to deliver on statutory requirements and

our commitment to the accountability structure are not specifically identified in the work plans but are assumed in all cases.

Outsource requirements

A number of the work plans seek approval to engage consultants to deliver on specific components of the work plan. As detailed in the individual work plans, the following topics need additional support beyond city staff resources:

- Commercial Strategy Study (confirmed \$175,000)
- Old Lakeshore Road (estimated \$60,000)
- Indian Point/Roseland (estimated \$70,000)
- Mobility Hubs (estimated \$120,000)
- Ward and Technical Issues (estimated \$75,000)
- Engagement and communication (estimated \$160,000)

The specific details of the outsource requirement are included in individual work plans.

The timelines set forth for this review will require that the team be as nimble as possible in the awarding of contracts to support the work. Project specific protocols for purchasing will be proposed and presented to Council.

Work Plan Options for Outsourcing

A capital account was established in the 2012 budget for the combined Official Plan Review and Zoning By-law Review. This account was based on preliminary estimates of \$400,000 for each project with a combined total of \$800,000. This account was also established with the understanding that the overall cost of both projects would be refined through scoping and work plan development, and could be adjusted in subsequent budget years.

It should be noted that \$175,000 of the original budget allocation has now been committed to the Commercial Lands Study. In addition, costs totalling \$3,700 were incurred for the Council Workshop held in early 2012.

Official Plan Review Option A

Option A consists of all the work plans contained in the appendices to this report. This option is consistent with Council's decision regarding the scope report, and is consistent with the City's commitment to engagement and communication.

The total estimated cost of the outsource requirements for this option is \$660,000 consisting of \$500,000 for planning resources and \$160,000 for engagement and communication resources (Appendix O). Selection of this option will require an additional allocation of \$260,000 to the capital account for the Official Plan Review or reconsideration of the budget allocation for the Zoning By-law Review. This decision

could be implemented in the 2013 budget. The budget impact of the Review on an annual basis could be mitigated by extending the timeline to completion beyond 2014.

Official Plan Review Option B

This option consists of all the work plans for planning work contained in the appendices, but reflects a reduced commitment to engagement. The difference is found in a reduced investment in the education and awareness components of the Option A engagement and communication activities which are intended to inform the public and encourage interest and participation.

The total estimated cost of the outsource requirements for this option is \$565,000 consisting of \$500,000 for planning resources and \$65,000 for engagement and communication resources.

Option B differs from Option A in terms of the following:

- A Council workshop on mobility hubs is removed (\$1,500)
- Focus group sessions for Plains Road issues are removed (\$5,700)
- A speaker series and related open houses are removed (\$18,000)
- One Telephone Town Hall is provided rather than two (\$10,000)
- Website enhancements including video production are removed (\$22,000)
- A public video contest is removed (\$1,400)
- All outsource facilitation services are removed (\$25,000)
- The advertising budget is reduced from \$18,800 to \$6,300
- Miscellaneous expenditures and contingency are reduced.

It should be noted that removal of all facilitation services will require back-stopping by City staff. Hence this measure should not be regarded as an overall net reduction.

Selection of this option will require an additional allocation of \$165,000 to the capital account for the Official Plan Review or reconsideration of the budget allocation for the Zoning By-law Review. This decision could be implemented in the 2013 budget. The budget impact of the Review on an annual basis could be mitigated by extending the timeline to completion beyond 2014.

Official Plan Review Option C

This option is consistent with the \$400,000 budget estimate contained in the 2012 capital budget, but does not capture the intended scope for the review or reflect the City's commitment to engagement. Staff do not recommend this option.

In order to meet this budget limitation the following cost elements would have to be eliminated from the Official Plan Review:

- The Mobility Hubs work plan at \$120,000

In 2008, Metrolinx, an agency of the Province of Ontario, adopted the Big Move, a 25-year transportation plan for the Greater Toronto and Hamilton Area. The Big Move identifies a system of connected mobility hubs throughout the regional public transit network and directs municipalities to prepare detailed master plans for each mobility hub. These hubs are intended to be significant points of intersection within the system where different modes come together seamlessly and where an intensive concentration of mixed land uses is focused to generate activity and to enable opportunities to live, work, shop and play. To guide planning and development of mobility hubs, Metrolinx has recently adopted Mobility Hub Guidelines which apply to long range policy initiatives (e.g. Official Plans, secondary plans) as well as station area master plans. Effective coordination of transportation and land use/place-making functions are critical to the success of mobility hubs.

There is latitude as to how and when mobility hub master plans are to be completed within the 25-year time frame. Given the early stage of implementation, there are a few municipalities that are starting to incorporate the mobility hub “lens” into their policy and a few municipalities that are undertaking mobility hub master plan work largely where Metrolinx has committed funding.

Burlington has two designated mobility hubs – Downtown and Burlington GO. At this time, there is no funding from Metrolinx committed to Burlington’s mobility hubs work. Planning staff propose to take steps toward conformity with the Big Move and to undertake the mobility hubs work in two stages: incorporating strategic policy into the Official Plan and Transportation Master Plan (stage 1) and completing master plans for the two designated mobility hubs in the near future (stage 2 and beyond the scope of the Official Plan Review).

The work plan outlines an approach to stage 1 that includes a consultant-led study to incorporate strategic policy into the Official Plan and delineate opportunities and parameters for future detailed master planning work for the two designated mobility hubs. The outcome of this work plan would be complementary policy for mobility hubs in the Official Plan and Transportation Master Plan that would position the City more strategically to foster relationships with Metrolinx and other potential partners as well as to capitalize on potential land use relationships unique to Burlington’s mobility hubs.

Should this work plan be eliminated, a staff-led review could propose language or placeholders in the Official Plan that will enable, in the future, the work provided for in the mobility hubs work plan. More detailed mobility hub studies would be undertaken after completion of the Official Plan Review and Transportation Master Plan update as a separate interdepartmental strategic planning initiative.

In addition, in Option C the engagement and communication cost component would be reduced from \$160,000 to \$20,000. This reduction would result in a significant reduction in engagement and communication activities, but would provide for the following:

- The \$3,700 already spent for the first Council Workshop

- The Council Workshop on Neighbourhoods now scheduled for October 4, 2012 (\$5,000)
- The Rural Area Summit proposed to occur in the first quarter of 2013 (\$2,250)
- Advertising (\$6,300)
- Contingency (\$2,750)

The engagement cost element could be increased by eliminating one or more of the planning cost elements and transferring the related funds to the engagement component. For example, the proposed Old Lakeshore Road design review and/or the Indian Point/Roseland area studies could be deferred to some future date after the Official Plan Review, subject to reconsideration of the standing Council directions.

Directions Reports

Many of the work plans include the delivery of Directions Reports to Council. These reports offer staff the opportunity to return to Council for confirmation and direction based on the findings of the research. Directions Reports will present to Council a basis upon which draft Official Plan policy will be developed. Should Council approve the Directions Reports the findings will proceed to the policy development phase of the project and staff will author policy in line with those directions.

As mentioned earlier, a number of the work plans are structured in such a way as to require confirmation of Council in order to set the appropriate direction informed by planning principles, best practice, research, and consultation. In cases like the Neighbourhoods Work Plan, the findings of the Council Workshop and the Public engagement opportunities will inform the development of a preferred approach to Neighbourhoods.

Release of Draft Official Plan

In all cases draft policy will be developed by city staff in accordance with Directions Reports or findings of technical working groups. The draft policy in many cases will be developed or vetted through tasks groups within the city or in association with appropriate agencies. The public will be provided with the opportunity to review proposed policy at the time when the entire Draft Official Plan is released. With a limited time frame for the project it is critical to preserve time in the work plan to write policy. The approach proposed will give the public opportunities for involvement prior to the development of Directions Report as well as an opportunity to review and comment on the Draft Official Plan Amendment.

Alignment

One of the overarching goals of good governance is to ensure alignment among all municipal plans and conformity with the plans of other levels of government.

City of Burlington Plans and Strategies

Early in the process one of the key alignment issues was to work collaboratively with other City Departments to ensure that the Official Plan Review supports and compliments City Council approved plans, initiatives, and tools used to help build and manage the city. Appendix B highlights several of the key city initiatives where those contribute directly to one of the eleven work plans. While not an exhaustive list of other city initiatives, this diagram highlights those ongoing city initiatives which are most related to the opportunities for transformation.

The incorporation of City Council approved directions is a technical matter and will be undertaken as part of the technical issues work plan. Policy staff, in collaboration with staff from the responsible department will draft policy for inclusion in the Draft Official Plan Amendment. This approach will not duplicate engagement or other efforts and will also ensure that policy reflects the direction provided by Council.

As discussed earlier the Official Plan Review has established a framework to ensure the continued involvement and input of the Inter-Departmental Working Group. This group will continue to meet regularly and will coordinate the consideration of various city initiatives in the context of the Official Plan Review.

The most critical alignment point to the Official Plan Review is the Zoning By-law review. The linkage between the two projects is reflected in the project accountability structure through the Planning and Building Resource Group. This group which includes the City's Co-ordinator of Zoning, Coordinator of Development Review, Coordinator of Site Engineering, and Coordinator of Site Plans & Urban Design will continue to meet regularly and coordinate between these two major projects. The Official Plan Review process will commit to engaging with the public with regard to specific topics and the various implementation tools that the City has at its disposal, including the Zoning by-law.

External Partners

The Official Plan Review will meet the minimum requirements of an official plan review as directed in the *Planning Act*. As a matter of due diligence the inclusion of appropriate agencies, the public and others will be included with relation to all work plans.

Completion

The Official Plan Review work plan has been developed based on a best effort basis and is proposed to extend to Q1 of 2014.

Success in attaining the timing objectives of the work plan is premised on Council agreeing to the outsource procurement protocol which will be presented to Council.

The work plan timing has required making informed assumptions about the timing of a number of related city projects and initiatives. While the policy group will not have

control of these various processes we do commit to including the recommendations/directions approved by Council within our work plan timeframe.

The work plan timing may also be affected by unforeseen engagement demands, unanticipated and emergent issues or the advancement of issues currently considered "on hold". Issues which have the potential to impact the work plan will be reported as they arise.

Financial Matters:

As proposed in PB-87/11 the Official Plan and the Zoning By-law Reviews were presented as a combined 'Official Plan' capital project which included \$400,000 of approved funding as part of the 2012 capital budget, as well as an allocation for \$400,000 in the budget year 2013, for a total budget of \$800,000 for both components. Information and advice regarding the specific approach to the development of the Zoning By-law Review will be provided later in 2012. It is understood that this aggregate amount will be spent over the duration of the two projects.

At this point in the process individual works plans and costs of individual engagement elements have been presented in the appendices. The aggregate costs of recommended OPTION A are:

- Outsource Requirements: \$ 500,000
- Engagement and Communications \$160,000
- Total: \$ 660,000

The above costs of Option A require an additional allocation of \$260,000 in the 2013 proposed capital budget, bringing the total budget request in 2013 to \$660,000, subject to council approval. This will change the total budget for the Official Plan Review/Zoning By-law Review from \$800,000 to \$1.06 million.

The estimates included in the individual work plans represent best estimates based on the understanding of the review to date. In the case of the hiring of consultants to complete specific elements of work the final costs will be confirmed through the tender process.

Any funds not expended will be returned to the capital funding sources for investment elsewhere.

Other Resource Impacts

As the Official Plan Review is a city-wide endeavour, an accountability structure within Planning and Building, an accountability structure across all City Departments and appropriate oversight by senior management form important components of the Official Plan Review.

Communication Matters:

Communications and Engagement Strategy

Engagement of the City of Burlington's citizens and stakeholders is a key component of the Official Plan Review. Citizen and stakeholder involvement will facilitate meaningful input to the Official Plan Review and make a positive contribution to decision-making. The work plan for Option A, described in Appendix O, presents the recommended engagement methods and communications tactics for the Official Plan Review process. The proposed combined engagement and communications plans offer multiple methods of informing and involving citizen and stakeholders, to ensure effective public involvement.

The proposed plan for engaging the community on the Official Plan Review (OPR) will include: pre-consultation with key stakeholders and stakeholder groups; citizen advisory committees; communications; community engagement; Council workshop(s); Telephone Town Halls with the Mayor as key speaker; meeting with councillors and their ward groups; a speakers series; online and youth engagement; open houses, focus groups and workshops.

The plan for communicating the OPR supports engagement and education, and creates awareness of the purpose of the OPR review. Communications includes OPR topics that are being studied; and informs people of the what, where, when, why and how of public involvement opportunities. Communications includes providing feedback to the community on the OPR input received and the changes resulting from the review process. Communications will use the identity statement:

We're Growing in Place: Burlington's Official Plan Review

Specific details of the engagement and communication components are noted in each individual work plan.

Conclusion:

The work plan and timing presented in this report suggest an ambitious and challenging review of the Official Plan. The work plan incorporates new approaches to engagement and directs attention to those areas of the plan which have the potential to transform planning in Burlington.

Respectfully submitted,

Alison Enns, MCIP, RPP
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Reviewed by:
 Alan Gummo, MCIP, RPP
 Manager of Policy and Research

Appendices:

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| A. Official Plan Review Work Program by Phase
B. Topic Relationships within the Official Plan Review
C. 2012 Official Plan Review Work Plan Overview:
OPTION A
D. Neighbourhoods Work Plan
E. Downtown Work Plan
F. Mobility Hubs Work Plan
G. Movement and Connectivity Work Plan
H. Nodes and Corridors Work Plan
I. Community Infrastructure Work Plan
J. Rural and Natural Heritage Work Plan
K. Ward Issues Work Plan
L. Technical Issues Work Plan
M. Waterfront Work Plan
N. Heritage Work Plan
O. Engagement and Communication Work Plan: OPTION A |
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Notifications:
 (after Council decision)

Name	Mailing or E-mail Address

Approvals:

*required

 *Department City Treasurer General Manager City Manager

	To be completed by the Clerks Department
Committee Disposition & Comments	
	01-Approved 02-Not Approved 03-Amended 04-Referred 06-Received & Filed 07-Withdrawn
Council Disposition & Comments	
	01-Approved 02-Not Approved 03-Amended 04-Referred 06-Received & Filed 07-Withdrawn