

Subject	SmartGuelph Implementation Initiatives
Recommendations	That the Committee recommend to City Council that the actions identified in Report 03-39 be initiated in 2003 as implementation measures to Council's adopted SmartGuelph Principles.
Background	<p>On Feb 3, 2003 following a year-long public engagement process, City Council approved and adopted eight SmartGuelph Principles as the basis of municipal decision-making and initiatives. Council also directed Staff to bring forward recommendations and work plans relating to implementation strategies for these principles following input from community stakeholders. The purpose of this report is to outline for approval the proposed actions to be initiated in 2003 to begin the process of implementing the City's adopted SmartGuelph Principles.</p>

Following Council's direction in February the following activities have been taken:

- Senior Staff including the CAO, Commissioners and Planning Director have collectively identified seven priority actions to be initiated in 2003 to begin to integrate the SmartGuelph (SG) principles into City processes;
- A project management expert was retained to assist Staff in developing a Project Charter and work plan for the identified initiatives;
- The Project Charter was reviewed and approved by the City's Project Management Committee on April 10th. This approval is required for priority corporate initiatives and it ensures concurrence with the scope and approach of the project so that staff resources required for it are available.
- Staff have met with counterparts at the Region of Waterloo and City of Hamilton to discuss the respective approaches to growth management and associated implementation measures. The initiatives proposed for Guelph are consistent with those being undertaken or contemplated by these other jurisdictions.
- Staff have held meetings with a number of key stakeholders including the Guelph Development Association to outline the proposed implementation actions and the process to be followed. This has resulted in support to bring the identified initiatives forward and to begin the process of implementation.

May 12th, 2003

Report # 03-39

Planning and
Building Services

Prepared by:
Craig A. Manley,
MCIP, RPP

Approved by:

Craig A. Manley -
Manager of Policy
Planning

J. A. Forbes -
Director of
Planning



The actions which are proposed to be initiated in 2003 are outlined below:

Decision Making Tool

- To develop a decision-making tool/approach to ensure that Council is advised how the approved SG principles are addressed when staff prepares recommendations to it.
- It should be easy to use
- Stakeholders should be convinced that it is an effective tool
- Training on how to use it will be provided

Starting Point Report

- A report outlining recent City initiatives that are aligned with the SG principles

Benchmarking Report

- A defined set of indicators that can measure the City's alignment with the SG principles that can be used to create a benchmarking report. As this will be reviewed every 3 years, it will provide a method to monitor and evaluate the success of the SG implementation.

SG Budget Review

- A review of the City's budget defining how well aligned the City's spending is aligned with the SG principles.

Long Term SG Finance Policy

- To develop a policy that ensures the City's long-term financial strategy will support the priority SG infrastructure facilities and programs. This will be a longer-term project and this phase will consist of 1) identifying priority SG infrastructure, facilities and programs and 2) defining a work plan to integrate this information over a 20 year period

For 2003 the extent of this project is limited to defining the approach to be taken to achieve these goals.

Method to Prioritize Development Approvals in 2004 DPP.

- To have a Staff / stakeholder working group create a tool / method / process to prioritise development approvals, so the approvals are aligned with the SG principles.
- To ensure that the tool / method / process is consistent, traceable and understandable in terms of application.
- To ensure that the tool / method / process allows for comparison between individual development proposals.

Best Practice Review & SG Policy Reform

- To identify development best practice and types of desirable development consistent with the SG principles;
- A review with the development industry identifying the municipal regulations and practices that restrict or limit the implementation of projects consistent with the SG principles
- To indicate the gaps between present policies and SG principles that support these desirable developments
- To start the process to remove the gaps.

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Attached in **Appendix 1** is the approved Project Charter outlining in detail the objectives, approaches, team make-up, effort days, costing and timing of these various projects.

Alternatives

1. To not initiate the identified implementation projects
2. To reduce the number of initiatives

Implications

The SmartGuelph Principles in the absence of actions to integrate them into municipal operations will be ineffective.

Funding

Approved Capital Budget

May 12th, 2003

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APPENDIX 1 Smart Guelph 2003 Implementation Project Charter

Version No.:	1.0
Date:	Mar 30/03

Project Name:	SmartGuelph	Number:	
Current Name Phase:	Planning		
Project Manager:	Don Carriere	Telephone #:	
Division Functional Director:		Telephone #:	
Project Sponsor:	Craig Manley	Telephone #:	

Version History	Changes	Date	Author
Distribution List			

Acronyms	Definition
SG	Smart Guelph
GREE	
GPSC	

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PROJECT DEFINITION

CORPORATE PROJECT PURPOSE:

On February 3rd, 2003 Guelph City Council adopted eight SmartGuelph principles as a basis for municipal decision-making and the management of the growth in the city over the next 25 years. Eight priority initiatives have been defined for a 36-month implementation period to operationalize these principles.

The purpose of this project is to implement a subset of the priority initiatives established as priorities for 2003 by senior staff through the development of work plans and resource requirements for the following initiatives:

Integrate the SmartGuelph principles into municipal decision-making.

Decision Making Matrix Tool: Create a decision-making matrix tool to ensure that the SmartGuelph principles and "triple bottom line" thinking is incorporated into all Council and staff decisions and reports.

Use benchmarking and assessment to measure progress

Starting Point Report: Prepare a 'Starting Point' report to identify what current City initiatives are being undertaken that are consistent with the SmartGuelph principles.

Benchmarking Report: Prepare a 'Benchmarking Report Card' to create indicators aligned with the SmartGuelph principles and to measure progress once per Council.

Align the City's fiscal resources to the SmartGuelph principles

SG Budget Review: Assess the City's existing budgets to ensure that



discretionary spending is aligned with the SmartGuelph principles.

Long Term SG Finance Policy: Develop a long-term fiscal strategy aligned with the SmartGuelph principles to put in place the necessary financial resources (in keeping with the City's overall financial policies) for the key infrastructure, facilities and program requirements of the City over the next 25 years.

Manage growth and development consistent with the SmartGuelph principles

Method to Prioritize Development Approvals: In consultation with the development community, establish mechanisms to prioritize development approvals and servicing capacity allocation to developments that are consistent with the SmartGuelph principles.

Pursue regulatory reform to support development consistent with the SmartGuelph principles

Best Practice Review and SG Regulatory Reform: "Best Practice ideas will be solicited from the development industry in Guelph and from other communities regarding innovative and efficient forms of development that are in keeping with the SmartGuelph principles. The factors contributing to the success of these 'best practices' will be identified. Then, regulatory and process improvements will be identified to facilitate such development in Guelph. This will be done in consultation with the development community.

CRITICAL SUCCESS FACTORS:

Decision Making Matrix Tool

- A review of tools to carry out this function that is easy to use.
- A cross-functional team to evaluate the most appropriate tool/s.
- Selection of a tool that is easy to understand and use.
- Establishment of a protocol to be followed for use of the tool.

Starting Point Report

- Creating list of current City initiatives
- A simple, graphically effective format
- Establishment of a protocol for the dissemination of the report.

Benchmarking Report

- Develop indicators
- Getting agreement on indicators
- Design report card
- Establishment of a protocol for the dissemination of the results.

SG Budget Review

- Development of a process to measure consistency of budgets to SG principles
- Completed review employing the process

Long Term SG Finance Policy

- Develop a long term (20 year) strategy for the key infrastructure, facilities and programs that ensure the needs and priorities are consistent with SG principles
- Develop a financial policy to support this strategy

Method to Prioritise Development Approvals

- Method / tools to prioritise development approvals and the provision of municipal services to reflect SG principles
- The development community has an opportunity for input

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Best Practice Review & SG Regulatory Reform

- A set of "Best Practice" ideas / an analysis of innovative and efficient forms of development.
- With a group of stakeholders, review and modify municipal infrastructure, development standards and regulations for consistency with SG principles

PROJECT GOALS:

Decision Making Matrix Tool

To develop a decision-making matrix tool to ensure SG principles are incorporated into city decision-making

It should provide a holistic approach to the decision-making process

It should be easy to use

Stakeholders should be convinced that it is an effective tool

Training on how to use it will be provided

Starting Point Report

The report

Benchmarking Report

To define a set of indicators that can measure the City's alignment with the SG principles that can be used to create a benchmarking report. As this will be reviewed every 3 years, it will provide a method to monitor and evaluate the success of the SG implementation.

SG Budget Review

A review of the City's budget defining how well aligned the City's spending is aligned with the SG principles.

Long Term SG Finance Policy

To develop a policy that ensures the City's long-term financial strategy will support the priority SG infrastructure facilities and programs. This will be a longer-term project and this phase will consist of 1) identifying priority SG infrastructure, facilities and programs and 2) defining a work plan to integrate this information over a 20 year period

Method to Prioritise Development Approvals

To have a tool / method / process to prioritise development approvals, so the approvals are aligned with the SG principles.

To ensure that the tool / method / process is consistent, traceable and understandable in terms of application.

To ensure that the tool / method / process allows for comparison between individual development proposals.

Best Practice Review & SG Policy Reform

To identify development best practice and types of desirable development

A review with the development industry identifying the municipal regulations and practices that restrict or limit the implementation of projects consistent with the SG principles

To indicate the gaps between present policies and SG principles that support these desirable developments

To start the process to remove the gaps.

PROJECT STRATEGY:

Decision Making Matrix Tool:

- 1) Carry out review of decision making tools
- 2) An assessment team will be established – staff & stakeholders
- 3) Develop an outline of the tool
- 4) Test the tool on a pilot basis to ensure it is effective and easy to use.
- 5) Preview with the Steering Group
- 6) Once the tool/s have been agreed upon there will be a training program established
- 7) A protocol document will also be produced indicating when the tool/s must be used.

Starting Point Report

- 1) Hold workshop of all city managers to ring in info on current initiatives
- 2) Inventory current initiatives aligned with the SG principles
- 3) Produce a draft
- 4) Identify stakeholders to review draft
- 5) Review and revise
- 6) Publish

Benchmarking Report

- 1) Define Benchmarking Team consisting of staff and stakeholders.
- 2) Develop list of indicators that measure the success of the implementation of the SG principles.
- 3) Test / measure the indicators in terms of data availability and effectiveness.
- 4) Create the Benchmarking report
- 5) Develop the process to provide this report every three years.

SG Budget Review

- 1) Define Budget Review Team
- 2) Team to define method to assess the alignment of SG principles and spending
- 3) Assess the existing budgets employing this method
- 4) Write a review of the results of this assessment
- 5) Have a Council workshop to review

Long Term SG Finance Policy

- 1) Define Finance Policy Team
- 2) Identify priority SG infrastructure, facilities and programs to be aligned with the SG principles over a 20 year period
- 3) Define a work plan

Method to Prioritise Development Approvals

- 1) Define Prioritisation Team consisting of City Staff and stakeholders
- 2) Identify possible factors to apply to Development Approvals
- 3) Select a the most appropriate factors and define initial weighting / scoring system
- 4) Test and apply the criteria
- 5) Review with a wider group of community stakeholders
- 6) Define when and how the method must be employed
- 7) Provide training

Best Practice Review & SG Regulatory Reform

- 1) Define team- staff and stakeholders
- 2) Collect "Development" best practices – innovative & efficient
- 3) Analysis of best "Developments" and factors contributing to their success
- 4) A workshop to review and select Best Practices that are appropriate to Guelph's SG Principles

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- 5) Identify gaps in existing policies / regulations / standards relative to SG principles to define constraints to be overcome.
- 6) Develop a program to close the gaps.

PROJECT PRODUCT DEFINITION

END PRODUCTS:

Decision Making Matrix Tool

A decision making tool
A trained set of users

Starting Point Report

Starting /Status Report

Benchmarking Report

A report providing a set of indicators used to measure the extent of alignment with SG principles.

SG Budget Review

A report assessing the alignment of SG principles and city spending

Long Term SG Finance Policy

Define the required infrastructure, facilities and programs that must operate within the SG principles.

Create a work plan to integrate this information and to bring them into alignment with SG principles within a 20-year time frame.

Method to Prioritize Development Approvals

A tool / method / process to prioritise development approval that are consistent with SG principles
A trained set of users

Best Practice Review & SG Regulatory Reform

A set of best development examples
A set of amendments to existing policy that will bring the policy in line with SG principles

KEY INTERIM PRODUCTS:

Decision Making Matrix Tool

A team
A set of sample decision making tools
A training plan

Starting Point Report

An inventory of initiatives consistent with SG
A draft report

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Benchmarking Report

A team
A set of possible benchmarking indicators
The initial assessment of indicators

SG Budget Review

A Team
A method to assess the alignment of SG principles and spending

Long Term SG Finance Policy

A team

Method to Prioritise Development Approvals

A team
A set of factors aligned with the SG principles
A set of methods and protocol for use of it

Best Practice Review & SG Regulatory Reform

A team
A set of Best Practices to review
A set of gaps between existing policies and SG principles

PROJECT SCOPE dependant on project	
Project Scope Is (Includes):	Project Scope Is Not (Does Not Include):
Only the SG infrastructure, facilities and programs – these will be detailed by some of the working teams.	All others will be out of scope of this project
Only organizations defined under the impacts sections – this is broken down by sub project	All other organizations are out of scope.

PARAMETERS

PROJECT OBJECTIVES	
SCHEDULE:	
Decision Matrix Tool – (15 effort days)	
Council Approval	Sept 30
A team	May 7
A set of sample decision making tools	June 27
Testing	Aug 1
Council Approval	Oct 6
Users Trained	Oct 31
Starting Point Report – (21 effort days)	

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Council Approval	June 30
List of City initiatives	May 23
Report format	June 13
Final Report	July 18
Benchmarking Report – (19 effort days)	
Council Approval	Sep 30
A team	May 23
A set of possible benchmarking indicators	June 20
Data Collection	July 18
Council Report	Aug 11
SG Budget Review – (10 effort days)	
Council Workshop	
A Team	June 6
A method to assess the alignment	June 20
Senior Mgt Review	July 11
Long Term SG Finance Policy – (10 effort days)	
A team	June 30
An approach / detailed work plan – priority areas defined	Aug 27
Council Approval of Work Plan	Sep 15
Method to Prioritise Development Approvals – (16 effort days)	Oct 6
A team including stakeholders	May 30
A set of measurement factors defined	June 13
Methods to measure factors	June 27
Testing & threshold definition	Aug 22
Refinements	Oct 6
Council Approval	Nov 17
Best Practice Review & SG Regulatory Reform (18 effort days)	
A team	May 30
Best practices research	July 30
Stakeholder workshop Gaps	Sept 19
Stakeholder Workshop Priorities	Oct 03
Action plan to eliminate Policy gaps	Oct 30
Council Approval	Nov 17
BUDGET:	
\$80,000 for Project Management, Best Practice Review Consultant & Expenses	

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KNOWN CONSTRAINTS:
RESOURCES: Obtaining City resources to form these teams will be difficult. However the team approach while slower will pay off in obtaining easier acceptance. Possibility of financial resource limitations
OTHER: 2003 Election Process may impact timing of decisions relating to specific initiatives Constructive collaboration with stakeholders associated with specific initiatives may affect timing The scheduling to get approvals by council is controlled by the dates of Council Meetings.

BEGINNING ASSUMPTIONS: The teams will be able to easily assemble and obtain various samples of the various tools, methods or processes to implement the initiatives – no need to re-invent the wheel. Stakeholders will work with City Staff in a constructive manner to achieve the specific work package objectives Council will approve the implementation work program.

RISK ASSESSMENT:	(High, Medium, Low)	
	Probability	Impact
Schedule Risk: Because of the need to use community resources to gain buy in the project planning schedule can be offset by the practical problems of get these groups together.	H	H
Budget Risk: The need for a Finance Consultant is unknown The cost of research in to Development Best Practices is difficult to define The cost of tool / model development is also open ended	M M M	M M M
Technical Risk: The availability of sufficient tools Developing these tools my be more difficult than anticipated	L M	M M
Other Risk: The development community may not want to participate as fully as envisioned	M	L

PROJECT ORGANIZATIONAL IMPACTS

PROJECT PLANNING TEAM	
NAME	ORGANIZATION & TELEPHONE
Craig Manley	
Don Carriere	
Steering Committee	

ORGANIZATIONS INVOLVED IN PROJECT EXECUTION	
INTERNAL:	CONTACT & TELEPHONE
Decision Making Matrix Tool	
CAO, Planning, Department Heads	
Starting Point Report	
Planning, Mayor's Office	
Benchmarking Report	
City Departments	
SG Budget Review	

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Finance, CAO, Community Services, E&T, Planning	
Long Term SG Finance Policy	
Finance, CAO, Community Services, E&T	
Method to Prioritize Development Approvals	
Planning E&T	
BP Review & Regulatory Reform	
Planning, E&T	
EXTERNAL:	CONTACT & TELEPHONE
Decision Making Matrix Tool	
None	
Starting Point Report	
Communications Consultant	
Benchmarking Report	
GREE, GPSC, University	
SG Budget Review	
None	
Long Term SG Finance Policy	
None	
Method to Prioritize Development Approvals	
Development Association, GREE, GPSC	
BP Review & Regulatory Reform	
Development Association	

ORGANIZATIONS IMPACTED BY THE PROJECT	
INTERNAL:	CONTACT & TELEPHONE
Planning	
Engineering	
Finance	
CAO	
City Council	
EXTERNAL:	CONTACT & TELEPHONE
Developers	
Community	

REPORTING RELATIONSHIPS:
 PM reports to project Sponsor Weekly
 PM will meet with each Work Package leader weekly (each of the 8 initiatives is a Work Package)
 PM and WP leaders will meet jointly every 2 weeks
 PM will provide a monthly report to Project Sponsor.

POTENTIAL PROJECT PRIORITY			
	TYPE PROJECT	STRATEGIC (X)	OPERATIONAL ()
	POTENTIAL PRIORITY:	HIGH (X)	MEDIUM ()
			LOCAL ()
			LOW ()

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USER/CLIENT RESPONSIBILITIES	
Council will have to evaluate and approve to schedule	
Staff will have to implement with the indented purpose	

COMPLETION CRITERIA	
Decision Making Matrix Tool:	A tool has been selected. The users are trained.
Starting Point Report:	The Status report.
Benchmarking Report:	The Benchmarking report. A process to create the benchmarking reports every 3 years.
SG Budget Review:	A report assessing how the City's existing budgets aligned with the SmartGuelph principles.
Long Term SG Finance Policy:	infrastructure, facilities and programs, which are operating within the SG principles. A work plan to integrate the costs within a 20-year time frame.
Method to Prioritize Development Approvals:	A method to prioritize development approvals Trained users
Best Practice Review and SG Regulatory Reform:	changes to existing policy that will bring it in line with SG principles

PROJECT PLANNING PARAMETERS	
DATE PLANNING COMPLETION DUE:	April 30
ESTIMATED PLANNING BUDGET:	\$25,000

SIGN OFF

SUBMITTED FOR PLANNING	SIGNATURE	DATE
PROJECT MANAGER		
SPONSOR		