

Smart Planning in Action

Three-year Strategic Plan
2013-2016

Interim Plan as of March 2013



A PARTNERSHIP
PROGRAM OF
THE FRASER
BASIN COUNCIL



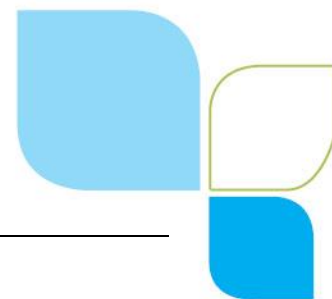


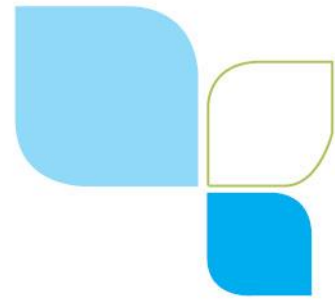
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SMART PLANNING IN ACTION

THREE-YEAR STRATEGIC PLAN 2013-2016: *DRAFT FEBRUARY 2013*



*Building on sustainability planning and principles, Smart Planning in Action will work with rural, remote and First Nations communities to achieve and measure on-the-ground integrated sustainability practises. Building capacity and bridges between small rural communities and neighboring First Nations communities is vital for key sustainability priorities such as reducing energy, providing clean drinking water, addressing social issues and improving infrastructure efficiencies. Serving as a well recognized resource hub with specialized facilitators across BC, **Smart Planning in Action** will support and link rural and remote communities with skills, expertise and other communities to maximize abilities and timeliness for bringing sustainability plans to action and clearly demonstrating progress towards sustainability.*

Introduction

Smart Planning in Action evolved from Smart Planning for Communities (SPC), a program of the Fraser Basin Council (FBC), a non-profit society that works to advance sustainability across the Province. Launched in 2008, Smart Planning for Communities is a collaborative BC-wide initiative providing resources and tools to local and First Nations governments for helping to create socially, culturally economically and environmentally sustainable communities. Smart Planning for Communities was initiated to support the requirement for Integrated Community Sustainability Planning (ICSP) in the 2005 Gas Tax Agreement. Much of this ICSP foundational work is now complete, and community needs have evolved from helping to justify and prepare plans, to helping to implement them. Implementation requires time and resources, and a fresh role for the SPC program that includes a mixed offering that builds on the foundational support of the first five years. Based on the outcomes achieved under the SPC Program's (initial) 5 year business plan, there is a clear opportunity to build on the successes SPC has achieved. Smart Planning in Action 2013-2016 is well positioned to address and achieve new targets facing BC's smaller rural communities, including First Nations.

A Look Back – The First 5 Years: 2008-2013

PROGRAM OBJECTIVES

The SPC Program had 5 core objectives during its initial 5 years, including:

- Build capacity, leadership and sharing of expertise in and across BC communities to integrate multiple objectives – social, cultural, environmental, economic – into their planning processes and set their own priorities for action;

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- Provide easier – and personalized – access to the wide range of resources on sustainability, so that decisions made by communities are strengthened and implemented efficiently
- Implement existing community efforts more quickly and efficiently by facilitating access to funds and service providers;
- Create synergies among service providers who are promoting sustainability planning in the province and nationally, and across aboriginal and non-aboriginal communities; and
- Link policy, practice, research and funding efforts – including across government agencies – so that these better support the development and implementation of sustainability planning in the province.

PROGRAM ACHIEVEMENTS:

From 2009 to 2012, SPC:

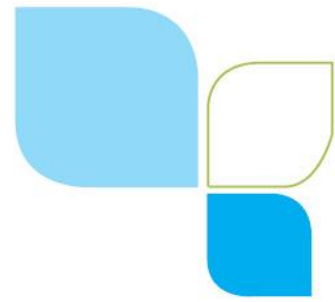
- responded to over 750 local government and First Nations requests for information and process advice;
- delivered (or partnered in the delivery of) over 200 presentations and workshops;
- made over 550 referrals to funding sources and/or other resources;
- facilitated over 80 collaborative processes, bringing communities and organizations together to explore ways to work better, together;
- facilitated over 32 cooperative actions between local governments and their First Nations neighbours in the Shuswap, Okanagan, Vancouver Island and northern BC;
- Managed the BC Climate Action Tool Kit supported by a three way partnership with the Green Communities Committee (with representatives from the Province and the Union of British Columbia Municipalities and Fraser Basin Council.

International Recognition for the Village of Telkwa

This small northern community contacted its local SPC facilitator, looking for assistance in choosing an ICSP process suitable for a small community. The facilitator helped them work through a number of frameworks and evaluate which route was most appropriate, and assisted with reviewing the Request for Proposals (RFP) to carry out the process. In addition to completing an ICSP, this process ballooned into a large and very successful community consultation project, resulting in an updated Official Community Plan (OCP), associated bylaws, and an Affordable Housing Needs Assessment and Action Plan (www.telkwa.com). If that wasn't enough, the Judging Panel of the 2012 Liveable Community (LivCom) Awards selected Telkwa as a silver award winner in the Socio Economic Section for its "Community Sustainability and Resilience Plan". In November 2012, three representatives from Telkwa travelled to AlAin, United Arab Emirates, to accept the award, share their story, and learn from others facing similar challenges.

The LivCom Awards were launched internationally in 1997 and are endorsed by the United Nations Environment Programme. More than 50 countries are represented annually.





OPERATIONAL STRUCTURE

The program's objectives were met through four key components, as follows:

- A **Funders Group**, to provide financial support, strategic direction and guide the business plan;
- A **Partners Group**, to link all orders of government, not-for-profit organizations, foundations and the private sector for sharing expertise in sustainability theory and practice, and in planning and implementing strategies to achieve sustainability at the community level;
- A network of expert **Sustainability Facilitators across BC**-- the cornerstone of the Program-- to advise and assist communities in developing their respective planning processes before taking action to implement the strategies;
- **SPC Website** to provide easy access to online tools, resources and information for local and First Nations government staff, complementing the "hands-on" support of the Sustainability Facilitators.

PROGRAM SERVICES

Objectives were met through the following key services:

- **Process Advice** with assessing community capacity for developing an integrated sustainability plan or planning process, or integrating sustainability principles and objectives into existing planning processes;

Village of Granisle - pop.~360

This small community's then Mayor Fredrick Clark contacted SPC's local facilitator in August 2009, looking for information on the Gas Tax Agreement, Green House Gas (GHG) reductions, and alternate energy sources/wood waste. Energy was the priority issue because the town had to heat its buildings with either electricity or propane - both too expensive for the Village's budget. The facilitator agreed to give a presentation to Council later in the fall.

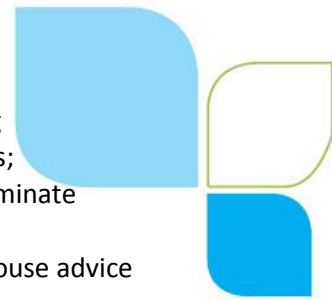
With the assistance of SPC's energy expert, the local SPC facilitator was able to link in an expert with the provincial government, who joined the facilitator in giving presentations. The recommendation was that Granisle do a Community Energy Plan first and then proceed from there.

The following winter/spring 2010, the Village contracted with Community Energy Association, who met with the Village and prepared the plan. One of the recommendations was a bio-mass/wood waste heating system for Granisle's municipal buildings. The following year, in October 2011, a system was installed and now heats the fire hall. The residual wood comes from wild fire mitigation programs in the Babine Lake Community Forest, held jointly by Babine First Nations and the Village of Granisle.

This story shows what a tiny municipality can do when it can access information, professional advice, and funding through SPC, has access to the land base and natural resources, and collaborates with its neighbours, the Babine First Nation.



- **Strategic Support** to identify opportunities for community engagement, funding and linking communities with experts and advisors that meet their unique needs;
- **Education and Training** where public, private and other organizations can disseminate best practices and lessons learned in particular areas of sustainability planning
- **Technical Expertise** on specific sustainability issues and topics by providing in-house advice or connecting communities with experts from the SPC Partners Group.



PROGRAM SUPPORT

The Program received diverse support over the five years from all levels of government and non-government partners, and by innovative approaches to securing resources. Combined, these strategies enabled SPC to react adaptively and with flexibility to changing funding realities over the course of its five year program implementation:

- Direct funding was provided by a diverse range of private and public organizations all committed to advancing sustainability in BC communities and providing support for Integrated Community Sustainability Planning (ICSP) to local governments and First Nations;
- Strong key partnerships with other non-profit organizations, government ministries and community organizations were a cornerstone for ensuring efficiencies in the delivery of services;
- Revenue opportunities were linked to two specific, specialized services that takes SPC’s light touch to a deeper engagement and addressed the challenge of undertaking ICSP processes in select communities:
 - The SPC **Smart Planning Report** provides a detailed review and assessment of existing community plans, identifies gaps in planning documents and opportunities for embedding sustainability principles into plans;
 - **SmartPlan for Small Communities** organizes on-site integrated community sustainability planning (ICSP) processes for communities with limited resources.

INDEPENDENT PROGRAM EVALUATION

Three independent formative evaluations were conducted by Junxion Strategies Inc. between 2008 and 2010. The resultant reports confirmed that SPC had high success in making a difference for rural and small communities across BC. In late 2010, the final Junxion evaluation was completed to assess the Program’s success in achieving its objectives (see 2.a.), concluding that:

...the SPC Program is well managed and effective. It has weathered the recent economic challenges and developed a strong foundation for future program delivery, and growth into the emerging need for community level sustainability implementation services. SPC has strong leadership, a capable and cohesive team, proven financial responsibility, and a focused and effective program. Its ability to further achieve its mandate and address the sustainability needs of the municipal sector is constrained solely by access to additional funding.¹

¹ Junxion Strategy Inc., “Smart Planning for Communities Program Evaluation—Phase III, Mid-Term Report, December 15, 2010 page 8.



Additionally, in 2012, the Research and Consulting Department of the Social Planning and Research Council of BC (SPARC BC) was retained to undertake a summative evaluation of accomplishments and challenges to date and will be completed in early 2013. The preliminary results reflect a well-recognized and unique resource that provided highly valuable to rural communities in addressing complex sustainability challenges. Final results expected late March 2013.



Moving Forward 2013-2016: Meeting Emerging and Evolving Needs

THE SUSTAINABILITY CONTINUUM: FROM PLANNING TO IMPLEMENTATION



In the early years of Smart Planning, ICSP was an unfamiliar concept. For some communities, it meant creating a unique plan; for others it was a new approach for integrating sustainability principles across existing planning processes. Smart Planning targeted local and First Nation governments to provide professional support and guidance to community planners and elected leadership. Typically, SPC staff would meet with local or First Nations government representatives, with follow-up activities often involving a presentation to Council, a public workshop, and emails or follow up conversations to answer questions. Over 600 of SPC's contacts between 2010 and 2012 were repeat contacts, demonstration of the responsive nature of SPC and the relationships it has built with local governments and First Nations over its initial five years.

Given the *Climate Action Charter*² and provincial requirements for local governments to include greenhouse gas reduction targets, policies, and actions in their plans, SPC staff has become “on the ground” facilitators for the Province’s climate action initiatives. In addition to its own highly regarded website (www.fraserbasin.bc.ca/spc_home.htm) linking communities to an array of sustainability planning resources, the SPC Program manages the complementary Climate Action Toolkit website (<http://www.toolkit.bc.ca/>), a joint Provincial/UBCM/SPC resource for climate action tools, resources, and solutions for local governments.

In the coming 3 years, SPC will continue to work towards the objectives set out in 2008, bringing people and communities together, easing access to information, encouraging synergies, building capacity and sharing best practices. However, as a testament to the success of the program in its first 5 years, sustainability priorities are quite different throughout the province than they did when the program was first established.

As noted above, many BC communities have now completed their ICSP planning processes, and are looking for assistance with implementing the plans. In the coming 5 years, the time is right for SPC to

² A voluntary agreement signed by most local governments in BC. Signatories commit to working to achieve three goals: becoming carbon neutral in their corporate operations, measuring and reporting on community greenhouse gas emissions, and creating compact, complete, and energy efficient communities.



evolve from focussing on planning, to working with communities all along the continuum – continuing to work with those just starting out with their plans, to assisting communities who are ready to implement.

KEY PRIORITIES FOR 2013-2016

1. Strengthen Rural and Small Town BC

The capacity of rural and small town BC to implement sustainability plans remains limited when compared to larger urban centres. Rural local governments and First Nations from across BC shared their knowledge and experiences on how sustainability planning can succeed in a 2012 SPC research report sponsored by PICS³. Communities with ICSPs were asked which factors would have made the greatest improvement to the process. *A commitment to implementation* was the most frequent response, followed by *human resources* (staff, outside experts, and/or volunteers). Ongoing support, whether from new internal staff or external resource people, such as SPC facilitators is crucial, particularly for implementation in rural and small communities. Smart Planning in Action offers skilled facilitators across BC able to support and motivate rural and small town BC in implementing sustainability plans and actions.



2. Address Critical Planning Gaps

To support the shift to implementation, SPC is well-positioned to facilitate innovative approaches such as **Smart Planning Report** and **SmartPlan for Small Communities**, where the program assists communities in planning the implementation of sustainability initiatives around the key priorities of energy conservation, greenhouse gas reduction, water, infrastructure and economic development. Smart Planning in Action will combine resource information support with more detailed analysis by those ready to implement local sustainability or ICS plans.

3. Plan Together: Build Effective and Collaborative Relationships between First Nations and Local Governments

SPC is uniquely recognized for building bridges on sustainability planning principles between local governments and their local First Nations. With all communities sharing the same land base and often shared infrastructure, there is a clear imperative to improve linkages between First Nations and local governments when planning infrastructure, joint resource management, professional development, and economic development. Building collaboration is a fundamental principle in Smart Planning in Action as reflected across the Advisory Committee, staffing and program design.

³ Chess, Joan, “*Integrated Community Sustainability Planning—Implications for Rural British Columbia*”, Fraser Basin Council, December 2012, 47 pages plus appendices, available at www.pics.uvic.ca or www.smartplanningbc.ca.

4. Enhance Access to Resources and Information

As noted, both the Smart Planning and the Toolkit websites are recognized across BC and beyond as high quality, easy to use sources of helpful information.



Enhancing the **SPC E-Binder**, a virtual resource library of logically categorized planning documents from BC communities, is critical. There is a clear call to augment the e-binder with annotated summaries and video presentations - communities want to hear real case studies, what worked and what didn't. For example, each year about fifty local government plans and projects are funded through Gas Tax Agreement funding programs, yet the reports and results are not easily accessible. Smart Planning in Action will review funded plans and projects, interview local government officials to elicit lessons learned, arrange for video

presentations for ones with key lessons learned and make the information available via the e-binder.

Enriching the **BC Climate Action Toolkit** to provide BC communities with the latest news, best practices and practical advice to help them reduce greenhouse gas emissions and implement their Climate Action Charter commitments is also a key priority. This highly popular Toolkit is vital to provide guidance and resources to support local governments to take a more integrated approach to planning that will lead to more resilient, complete, compact and livable communities.

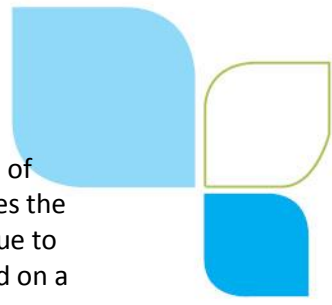
5. Measure Success

Through Smart Planning in Action, there is a need to measure the progress of communities towards sustainability. There is significant numerical and anecdotal evidence of communities moving forward and becoming more sustainable. However, there is a need to measure this success more systematically. How many communities have adopted ICSPs? What progress are communities making in implementing their plans? What difference has Smart Planning in Action made to the sustainability of these communities? In the next 3 years, Smart Planning in Action will develop and track indicators of success for communities it works with, which will enable the communities to understand their own progress, and which will, in turn, allow the program to measure its impact more accurately.

6. Address Research/Knowledge Gaps

While sharing information and expertise is and will remain a key component of SPC, there are key areas where further research is required. What is working for communities? How will the needs of communities evolve with respect to sustainability planning? Over the next 3 years, Smart Planning in Action will continue to address the objective of linking research, policy, practice and funding efforts by seeking out areas where enhanced knowledge is needed, and sharing these gaps with policy makers, academia, and on-the-ground practitioners.





BUDGET

Smart Planning in Action is based on a multi-party budget including revenues from all levels of governments and private sources, including foundations. This diverse funding source enables the program to work across all jurisdictions in building capacity and linkages rather restricted due to specifications of a funding requirement. The three year, two million dollar program is based on a \$600,000-\$700,000 annual budget that includes:

- Funding support from federal, provincial and local governments;
- Funding support from private sources through foundations and sponsorship;
- Skilled staff team of 5 located across BC bringing together expertise in community planning, first nations collaboration, energy and leading edge communications;
- Resources and e-tools to build capacity for rural, remote and First Nations communities across BC;
- Climate Action Tool Kit linking and sharing resources for BC's small diverse communities.

IMPLEMENTATION STRUCTURE

A renewed Smart Planning would operate with a slightly modified structure as the previous 5 years, with the following elements:

i. **Advisory Group**

To provide future strategic oversight and direction for Smart Planning, a specialized advisory group including funders, experts in community sustainability planning and implementation will guide the SPC Program with the necessary strategic and operational guidance over the next three years ([See Appendix I](#)).

ii. **Sustainability Facilitators**

The credit for the achievements of the program's first five years resides to a large degree with the dispersed and diverse Sustainability Facilitator model. The quick and expert response from a facilitator who is familiar with the local government environment and who has local/regional knowledge will continue to be critical to building on the successes of the past. The need to maintain leading edge resources to assist communities respond to changing energy needs is recognized as critical. In addition, the unique ability to encourage and facilitate cross-communities communication and planning, including First Nations, is expected to be in high demand over the next three years.

iii. **On-line Resources**

Continue to provide ease of access to information by keeping the content of the SPC website and the Climate Action Toolkit website current with evolving sustainability and climate action topics and processes.

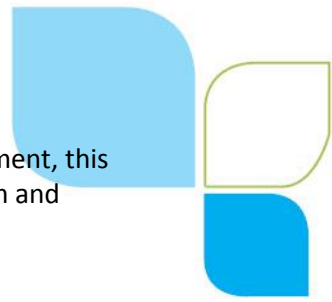
iv. **Community of Practice**

Connecting sustainability leaders, educators and practitioners through e-tools, webinars, and through electronic and face to face forums will share experiences and expertise on emerging issue related to the shift from ISC planning to implementation.



v. Indicators Group

Using innovative and emerging techniques in the field of performance measurement, this group will lead in the development of indicators of success, to allow the program and communities to measure their progress towards sustainability.



The Road Ahead



As a result of implementing Smart Planning for Communities, communities across BC now have easier access to resources, expertise and partners as they pursue sustainability planning. Over the five years of SPC, communities were able to draw on best practices, tools and approaches generated within BC and beyond, with a program structure that extended learning to other communities.

Now, as BC moves forward, capacity building is a necessary first step for communities. As BC communities complete their planning processes, there is a need for assistance with

implementation of those plans to build on the good work achieved across BC in moving sustainability forward through Integrated Community Sustainability Planning.

Smart Planning in Action business plan presents a new and expanded role as an innovative program over the next three years that supports communities in actual implementation activities. The Smart Planning in Action is ready to:

1. Strengthen Rural and Small Town BC;
2. Address Critical Planning Gaps;
3. Plan Together: Build Effective and Collaborative Relationships between First Nations and Local Governments;
4. Enhance Access to Resources and Information;
5. Measure Success;
6. Address Research/Knowledge Gaps.

Smart Planning in Action builds on the success of the past with a strong diverse suite of facilitators offering backgrounds in energy, First Nations-Local governments relationships, and strong effective e-tools and resources. With Smart Planning in Action, BC communities will be better able to identify and find resources for and carry out priority activities to implement their long-term vision of sustainability. The movement of BC and its communities towards sustainability practices will be shared and measured to demonstrate success within each area and across the province.

APPENDIX I: Smart Planning for Communities: In Action

ADVISORY GROUP

DRAFT Terms of Reference, January 2013

BACKGROUND

Smart Planning in Action is based on the success of the Smart Planning for Communities program, a collaborative BC-wide initiative providing resources and tools to local and First Nations governments for planning socially, culturally, economically and environmentally sustainable communities.

Smart Planning for Communities successfully delivered most of the program components established in its March 2008 Five Year Plan. A new draft Strategic Plan has been prepared to guide a freshened program over a three year period starting in April 2013. One of the proposed changes responds to the need for a more efficient, streamlined structure to provide the Program with the necessary strategic and operational guidance over these three years. For its first five years, a Partners Group provides strategic direction and a second committee, the Funders Group, provides financial support and approved program plans, budgets, and reports. Given a more focused program and budget uncertainties, a single oversight committee that combines the key roles played by both groups is both appropriate and timely. These Terms of Reference establish the role and structure of this Smart Planning for Communities Advisory Group.

Smart Planning consists of the following main components:

- 1) An Advisory Group that seeks and delivers financial support, provides strategic direction, and oversees implementation of the three year strategic plan;
- 2) A network of Sustainability Facilitators led by the Program Manager; and
- 3) A “first stop” website providing high quality, easy to use sources of timely, topical information.

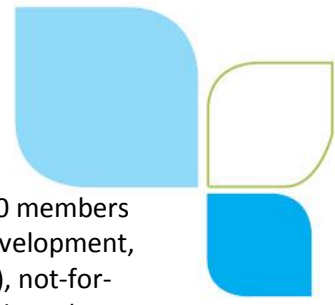
Building on the foundation of Smart Planning for Communities, Smart Planning in Action will assist communities in sustainability planning and implementation, with an emphasis on rural and small town BC, and First Nations planning and collaborative planning between First Nations and local governments.

ROLES OF THE ADVISORY GROUP

The main role of the Advisory Group is to provide strategic advice to the Smart Planning Program Manager to help ensure that the program evolves to addressing emerging issues and opportunities.

This includes:

- a) Providing strategic direction on current and emerging issues for communities and funders;
- b) Reviewing and recommending updates or revisions to the three year strategic plan;
- c) Advising on fee for service policy, opportunities and proposals (e.g. the Smart Plan and Smart Plan Review initiatives);
- d) Recommending financial opportunities;
- e) Recommending potential opportunities to leverage additional resources (e.g. in kind contributions, part time secondments);
- f) Reviewing and providing feedback on annual reports and upcoming annual plans;
- g) Reviewing program evaluations and advising on indicators, measures, and outcomes to help gauge program success.



STRUCTURE

1. Membership

The Smart Planning for Communities Advisory Group will be inclusive and diverse, with 6-10 members invited from the Provincial Government (e.g. Ministry of Community, Sport and Cultural Development, the Climate Action Secretariat) other levels of government (e.g. First Nations, local, federal), not-for-profit organizations including foundations (e.g. the Real Estate Foundation of BC), public utilities (e.g. BC Hydro), the private sector, professional associations, and universities. Members will be expected to:

- a) Have expertise in community sustainability planning and implementation, and/or a particular aspect thereof;
- b) Commit to work towards long term and comprehensive sustainability planning for communities;
- c) Be willing to help provide direction or seek financial support for the program, both from the organizations they represent and other potential funders;
- d) Be willing to work by consensus with other members of the Advisory Group.

2. Chair of Advisory Group

The Advisory Group will appoint a Chair by consensus for a term of one year, subject to renewal. The Chair's role is to moderate each meeting to achieve the meeting's objectives, and to ensure an inclusive approach with all members. Between meetings, the Chair will represent the Advisory Group in liaising as needed with the Program Manager. In addition, the Chair may be asked to serve as the spokesperson of the Advisory Group in communications with the media; if this occurs, any public messaging should reflect the consensus views of the Advisory Group and be approved in advance by the Program Manager.

3. Guests and Other Advisors

The Advisory Group may invite individuals or organizations to attend a meeting to provide input and guidance.

4. Fraser Basin Council Secretariat Support

The Fraser Basin Council provides secretariat support to the Advisory Group through the Smart Planning for Communities Program Manager, assisted as required by other Fraser Basin Council staff. This support includes coordinating meeting logistics, materials, and meeting notes, and preparing reports for review by the Advisory Group.

MEETINGS

The Advisory Group will meet in person at least once a year, and 2-4 times/year by teleconference or videoconferencing. Agendas are developed by the Chair and Program Manager after input from members. Agendas may include

- a) Approval and/or revisions to the agenda;
- b) Appointment of an upcoming Chair;
- c) Participation of guests and advisors;
- d) Review of the budget;
- e) Topics for discussion, including those noted above under "Roles of the Advisory Group".

REVIEW OF TERMS OF REFERENCE

The Advisory Group will review and revise as necessary its Terms of Reference annually.