

Collaborative Planning in Action:

Lessons from the Carman-Dufferin Planning District

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Abstract

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The Carman-Dufferin Planning District Development Plan and Zoning By-law, prepared by Lombard North Group and adopted by the Planning District in 2014, are district-wide planning documents addressing the long-range needs of the Town of Carman and the Rural Municipality of Dufferin, approximately 40 km southwest of Winnipeg. The plan review process used a collaborative strategy, requiring substantial inter-municipal and inter-governmental cooperation, to produce planning documents that met the goals of the concerned municipalities and ensured a streamlined Provincial approval process. Through successful municipal cooperation, the award-winning development plan was able to deliver cost sharing agreements and fringe area policies amenable to the Planning District as a whole, while ensuring district goals related to such priorities as age-friendly issues, active transportation, and sustainable and resilient communities were addressed with comprehensive policy. The zoning by-law, an innovative document that represents the first district-wide zoning by-law in Manitoba, is a further testament to the success of the collaborative approach taken. The documents' success hinged on the creation of a Technical Advisory Committee in conjunction with a meaningful public engagement strategy that exceeded provincially legislated requirements. This case study explores the best practices employed by Lombard North Group to develop and deliver these distinguished planning documents, and provides lessons to inform and improve upon future planning practice in Manitoba.

Introduction

In 2013 Lombard North Group (LNG), a Winnipeg-based planning consulting firm, was retained to undertake a detailed plan review for the Carman-Dufferin Planning District (CDPD). The resulting Carman-Dufferin Planning District Development Plan and Zoning By-law, adopted by the Planning District in 2014, address the mutual long-range planning needs of the Town of Carman and the Rural Municipality of Dufferin, located approximately 40 km southwest of Winnipeg.

The Development Plan, which won a 2015 Manitoba Planning Excellence Award, was able to deliver cost sharing agreements and fringe area policies amenable to the Planning District as a whole, while ensuring district goals related to such priorities as age-friendly issues, active transportation, and sustainable and resilient communities were addressed with comprehensive policy. The Zoning By-law, which reconciled two incongruous sets of regulations into one coherent and user-friendly collection, became the first district-wide zoning by-law in the province, representing an innovative planning achievement for Manitoba.

The success of these documents hinged on a strong collaborative approach, requiring substantial inter-municipal and inter-

governmental cooperation, along with a meaningful community engagement strategy. With their unique and effective plan development process, LNG was able to deliver final products that met the goals of the Planning District and individual municipalities, promoted sustainable planning practices, and ensured a streamlined Provincial approval process.

Background

Planning Theory

The unique collaborative effort undertaken for the CDPD plan review was key to its success and is supported as an example of good process by planning theory, as collaboration is considered “a canon of good and ethical planning practice” (Seltzer & Mahmoudi, 2012, p.



This case in point explores the best practices employed by LNG to carry out this detailed plan review and reveals lessons that can help to inform and improve upon future long-range planning practice in Manitoba.

3). Additionally, the practice of including broader civic participation can be an important tool to address “deep and complex problems” and “can be vital for resolving community-based issues, such as the micro-politics of conflict over service provision, land-use planning and infrastructure projects”

(Head, 2007, p. 449). The planning literature also suggests collaboration should not only incorporate citizens, but should use a “multi-dimensional model” in which the understanding of “polity, interests, and citizenry co-evolve” (Innes & Booher, 2004, p. 422). Collaboration should not be “one-way communication from citizens to government” and vice versa, but rather a process where “communication, learning and action are joined together” (Innes & Booher, 2004, p. 422).

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It will be shown that the collaborative process undertaken by LNG adheres to all of these principles of planning theory.

Planning Legislation

Despite a strong emphasis on the importance of collaboration in the planning literature, Manitoba planning legislation has minimal collaborative requirements regarding the creation of development plans and zoning by-laws. In Manitoba, the relevant legislation is the *Planning Act* (Manitoba, 2005). According to the act,

plan development for a planning district requires consultation between the district board and the councils of its member municipalities, the relevant school board, and a qualified land use planner, however, what constitutes consultation is not defined (Manitoba, 2005, p. 46-47). Additionally, a minimum of one public meeting must be held during plan preparation, and one public hearing must be held between first and second reading in the adoption process (Manitoba, 2005, p. 47). The latter is also the only related requirement in the preparation and adoption of a zoning by-law (Manitoba, 2005, p. 66).

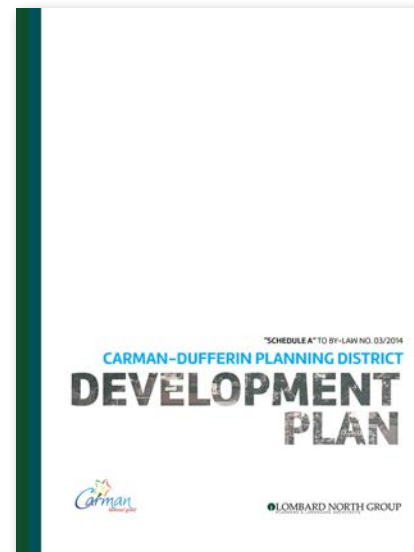
As will be described in greater detail in subsequent sections of this case study, the CDPD plan review process went well beyond these legislative requirements.

Implications for Planning in Manitoba

In 2013, the Province enacted the *Municipal Amalgamation Act* requiring municipalities under 1,000 in population to amalgamate with one or more neighbours by 2015 or else fail to meet the minimum population threshold to be considered an incorporated municipality. This has led to an increase in newly amalgamated rural municipalities across the province in need of new development plans and compliant zoning by-laws.

As the CDPD had a similar need to update its key strategic

planning documents, having only formed January 1, 2013, it makes for a particularly valuable case to study as its experiences can serve to inform and improve upon the surge



of long-range planning efforts being undertaken across the province. With an emphasis on municipal cooperation and stakeholder collaboration, the lessons gleaned from the CDPD Development Plan and Zoning By-law prove particularly valuable for these formerly disparate municipalities.

The Process

Commonly, the process for preparing development plans and zoning by-laws in Manitoba proceeds through the minimal legislated requirements of the *Planning Act*. In the case of many plans, it is only after the first reading, after significant time and resources have been

invested into draft policies and mapping, that it is circulated to Provincial departments for review and approval. Unsurprisingly, being the first time the document is seen by all Provincial stakeholders, new issues inevitably arise, requiring a series of revisions and drawing out the approval process. In some cases this can create a contentious process taking several months to over a year to progress to final approval, delaying the possibility of plan implementation and requiring a significant investment of additional time and resources for all involved.

In order to streamline the approval process, as well as

to craft policy that would have buy-in from all stakeholders, LNG went above and beyond the legislated requirements by forming a Technical Advisory Committee (TAC) in conjunction with an expanded strategy for meaningful public engagement.

The Technical Advisory Committee (TAC)

The key to LNG's collaborative strategy was the creation of a TAC, comprised of provincial department representatives, municipal councilors, the District Planning Board, a Manitoba Public Schools Finance Board (PSFB) member, and land use planners. More specifically, the committee included

provincial representatives from Manitoba Agriculture Food and Rural Development (MAFRD), Manitoba Infrastructure and Transportation (MIT), Manitoba Conservation and Water Stewardship, and Manitoba Municipal Government (MMG).

Plan preparation was broken down into three major stages that included the creation of a comprehensive background study, the formation of a strategic planning framework to inform initial policy direction, and crafting final draft policy and mapping for the development plan and zoning by-law. The TAC had three meetings to review and discuss project milestones, one for each major stage of the



process. TAC members were circulated draft copies of all documents produced, such as the background study, with time to review prior to each meeting so that all members were well-informed on plan progress and prepared to discuss any potential issues related to their particular area of interest. In general, identifying the community's vision and goals, policy direction, ways of improving existing by-laws, and potential deficiencies were emphasized in the discussions.

Conducting such in-depth consultation with stakeholders via the TAC ensured efficiencies

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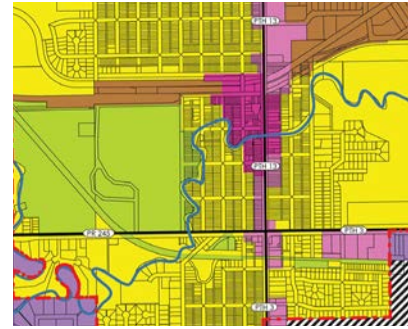
could be found throughout the development plan and zoning by-law creation process. Additionally, through provision of technical expertise, discussion of best practices, and collaborative problem solving, the TAC process ensured differing perspectives could be readily shared and that a balance could be met between Provincial interests and local needs at each stage of plan development.

Community Engagement

Community engagement was another indispensable component of the collaborative strategy and was strengthened through its use in conjunction with the TAC process.

Three open houses were held for residents and other community stakeholders in the CDPD: the first two for the overall development plan review process, and a third specifically dedicated to the new zoning by-law. In broad terms, the engagement efforts focused on three questions: (1) where are we (the CDPD) coming from, (2) where are we going, and (3) how are we going to get there?

The TAC was incorporated into each phase of the public engagement strategy, as TAC meetings were scheduled to follow the community open houses, allowing for any salient topics raised at the open houses to be discussed by TAC members for problem solving and policy consideration. Taking further advantage of the collaborative synergies between the TAC and public engagement process, many of the TAC members attended the open houses, and TAC members availed themselves to address community inquiries and requests outside of the scheduled engagement events, ensuring an active dialogue between all stakeholders.



The Outcome

The collaborative process undertaken for the CDPD was key to producing **Manitoba’s first district-wide zoning by-law**. It was only as the development plan review process unfolded that the District Board and Councils determined they would be amenable to a district-wide zoning by-law, a testament to the early success of the collaborative process.

The new zoning by-law replaced two separate documents governing each municipality, reconciling the municipalities’ distinctly different needs. The advantage of the new consolidated by-law meant redundancies in the existing by-laws could be removed, conflicting use regulations could be resolved, and interpretation could be simplified, limiting confusion for users and increasing efficiency for local administration and the District Board.

The new zoning by-law also incorporated several

components that allowed for improved provision of amenities and supported a more compact, livable, and sustainable built form for the CDPD. These included such things as provisions for bicycle parking, secondary suites, temporary car shelters, gentle density increase, and flood-prone area restrictions. Ultimately, appropriately facilitated communication between the two municipalities ensured a final product that was easy to use and met the needs of Planning

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District administrators, residents, businesses, and development interests, while enforcing consistent standards for the safety, function, and aesthetic of the CDPD.

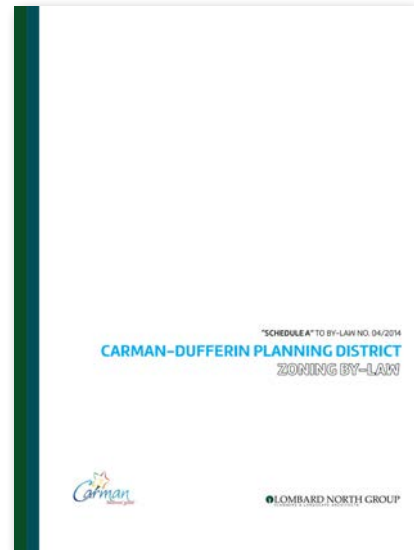
The high degree of cooperation also helped to create **an award-winning development plan** that promoted principles of sustainability while ensuring both communities' current and future needs were met. The new development plan

allowed for seamless growth over municipal boundaries and contiguous development able to take advantage of existing investments in services and amenities. Supported by urban-rural fringe policies implemented through tax and servicing sharing agreements, the two Municipalities could share the costs and benefits associated with growth. Further addressing the needs of residents, the new plan also emphasized policies that promote an active lifestyle and age-friendly development, supporting the District's aging population.

One further successful outcome, pertaining to both the development plan and zoning by-law, was the **provision of all mapping in KMZ/KML** (Keyhole Markup Language) format. This allowed mapping data, such as land use policy areas, to be uploaded into Google Earth, providing an accessible software platform for Councils, the District Board, administration, and residents to easily use and better understand the planning opportunities in their community.

Overall, the CDPD process, combining the use of a TAC with a meaningful public engagement strategy, provided an active dialogue between all stakeholders, enhanced understanding of local and provincial issues for all involved, and encouraged inclusion of best practices in both planning documents produced. It also

resulted in a more effective and efficient use of time and resources for all involved, as problems could be worked through early on rather than relying on substantial provincial



involvement at later stages of review. Therefore, plan preparation also turned a potentially contentious approval process into a conciliatory one, as collaboration and engagement resulted in a high level of interest in the planning process and buy-in from local and provincial stakeholders. This was reflected in strong attendance at open houses and timely provincial approval. With the province able to provide a complete assessment of any impacts the new plan might have, the District could also be more comfortable answering to ratepayers on their decisions.

Sheri Grift, a representative of MAFRD involved in the TAC

process, was so satisfied with how it unfolded she endorsed it for a Manitoba Planning Excellence Award, stating:

“In my view, what makes this particular TAC process stand out is the strong sense of commitment by all involved to find solutions through consensus. This made the experience a positive one, and lead to a better understanding (for all parties) of the breadth and scope of the issues, challenges and opportunities for land use and development in Carman-Dufferin and the province as a whole” (LNG, 2015, p. 5).

By facilitating a more involved dialogue between municipal and provincial stakeholders and fostering a strong commitment to the collaborative TAC

process, challenges could be addressed as they arose. This smoothed out the plan development process and secured development plan approval within just two weeks. Approval of the district-wide zoning by-law, the first of its kind in Manitoba, took only a month between first and third reading.

Lessons Learned

The TAC process is not common in the preparation of development plans for rural municipalities, as it is not a legislated requirement. However, this was not the first time a TAC had been used, as it is a practice informally supported by the Province, particularly

in areas experiencing high development pressure, such as municipalities in the Capital Region surrounding Winnipeg. Nonetheless, a number of subtle distinctions made the CDPD process a successful standout and the following lessons were key to its implementation:

Planner as Facilitator

Having a planning consultant, such as LNG, that can lead and facilitate collaborative efforts is vital to ensuring an effective and streamlined process. Having professional expertise with both municipal and provincial planning matters, the planning consultant can also help to bridge communication



between local and provincial representatives on complex issues. Furthermore, the planner is indispensable for coordinating engagement events, consolidating stakeholder feedback, implementing revisions, and keeping the process moving forward.

Early and Sustained Involvement of the Approving Authority

Involving the approving authority in the collaborative effort early on is crucial to address issues as they arise and ensure timely adoption of final planning documents. In the case of the CDPD, members of several Provincial departments participated, possessing a variety of responsibilities. Their involvement ensured their particular needs were addressed while minimizing conflict with the interests of other stakeholders. Additionally, having an acting liaison to provincial stakeholders can help to improve communication and coordination. Chris Leach with MMG acted in this capacity for the CDPD effort.

A Diverse and Committed TAC

Having a diverse set of stakeholders that bring an understanding of both urban and rural interests, in addition to local and provincial interests, provides greater opportunities for information sharing and problem solving. With each representative having a unique priority, perspective, and skill set, the

greater the potential for effective collaboration and the greater the opportunity for innovation. Having TAC members committed to the effort is also key to ensure a positive, cooperative, and mutually beneficial process.

Engaging the Community

In addition to gaining valuable insight and feedback from the community, incorporating a meaningful public engagement strategy can create a sense of ownership over the planning process, garnering a greater degree of public support. Public consultation can also be reinforced through the efforts of committed TAC members directly addressing community inquiries and requests, engaging residents and business representatives in an active dialogue.

A Comprehensive Background Study

One less prominent consideration, cited as invaluable by participants of the CDPD TAC process, was ensuring a comprehensive background study is created in the first stage of the plan review process and circulated to TAC members prior to the first meeting. A background study that identifies goals, issues, strengths, and resources of the district and municipalities provides a clear starting point for discussion and can help to identify potential issues early on.

Conclusion

In addition to presenting comprehensive policy and successfully addressing community priorities, the Carman-Dufferin Planning District Development Plan and Zoning By-law provide an example of best practice through the successful public engagement and Technical Advisory Committee process used by Lombard North Group to progress the plan through each stage of its development and eventual approval. This was a well-appreciated process, considered to be invaluable by involved stakeholders, and crucial to the documents' timely provincial approval.

The Technical Advisory Committee process was a key component, providing a platform for collaboration that brought together a diverse range of local and provincial representatives, while complimenting public engagement by establishing an active dialogue with community members. Having land use planners to facilitate the diverse and committed representatives, reaching out to engage the community, and providing a comprehensive background study to establish a productive discussion early on were all key in creating an award-winning development plan and first-of-its-kind zoning by-law for the Planning District.

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