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A FRAMEWORK FOR UPDATING INFRASTRUCTURE MASTER PLANS

The Planning and Economic Development Committee recommends the adoption of the recommendation contained in the following report dated September 2, 2010 from the Commissioner of Planning and Development Services.

1. RECOMMENDATION

It is recommended that:

1. Regional Council endorse the framework for future review and updates of the Infrastructure Master Plans including:
 - Regular monitoring reports.
 - Periodic updates as part of existing review processes.
 - Comprehensive updates as required.
 - Completing a review of the Master Plans on a minimum 5 year cycle.

2. PURPOSE

This report seeks Regional Council endorsement of a framework for updating the Infrastructure Master Plans. This report also identifies the existing Regional processes that could be utilized to document the changes made to the existing Infrastructure Master Plans.

3. BACKGROUND

The Infrastructure Master Plan Updates were endorsed by Council in November 2009

The Transportation and Water & Wastewater Master Plan Updates were endorsed by Regional Council on November 19, 2009. These Master Plans will guide the Region's infrastructure needs for water, sewers, roads and transit for the next 25 years and beyond. They were coordinated with the Region's growth management initiative, *Planning for Tomorrow* and the Regional Official Plan (ROP) update. They incorporate the Province's *Places to Grow Act* with significant increases in population and employment forecasts, changes in land use planning and environmental policies.

The normal frequency of Master Plan formal review and/or updates is based on a 5 year cycle

The 5-year review is due to the requirements of the *Planning Act* and the Municipal Class Environmental Assessment (EA) process. The ROP is updated every five years and the Master Plans are tied to the ROP. The Master Plans are Municipal Class Environmental Assessment EA documents. According to the Municipal Class EA document (2007), a Master Plan should be reviewed every five years to determine the need for a detailed formal review and/or updating. Potential changes which may trigger the need for a detailed review include:

- Major changes to original assumptions
- Major changes to components of the Master Plan
- Significant new environmental effects
- Major changes in proposed timing of projects within the Master Plan

Full updates to the Infrastructure Master Plans require considerable effort and there is currently no formal framework for utilizing existing processes to be more responsive to significant changes in legislation and development

The 2009 updates to the Transportation, Water & Wastewater Master Plans took 2 to 3 years to complete with significant consultation, technical input, and documentation. An update to a Master Plan to address certain key assumption, legislation, or development changes may take significant effort and time to respond. As such, a formal framework for effectively using existing planning processes and mechanisms is required to be more responsive to changes and reduce the scope and facilitate the regular 5 year reviews.

4. ANALYSIS AND OPTIONS

There are many events and changes that can happen after a Master Plan is updated. Some are major changes that affect the base assumptions of the Master Plan. These major changes are potential triggers for updating the Master Plan. Other changes are minor and can be accommodated through existing processes such as the 10-year capital plans and secondary plans and do not trigger a Master Plan update.

Updates to the Infrastructure Master Plans will continue to be coordinated with the 5-year cycle of the OP review and update. The proposed framework provides a process for more frequent periodic updates of the Master Plans to keep them current.

Council Attachment 1 is a flowchart that shows the proposed framework for updating the Infrastructure Master Plans. The framework shows the potential triggers for updating the Master Plans, and the coordination required between Master Plans and other studies.

Potential triggers or drivers for examining need to update Master Plans

When there are significant economic, legislative and political changes, the base assumptions on development phasing, funding availability and financial sustainability of proposed infrastructure may no longer be valid. The major changes that are potential triggers for examining the need to update the Master Plans include the following:

- Master Plan base assumptions
- Master Plan components
- Timing and scope of projects in the master plan
- Legislation
- Financials
- Environmental effects

Examples of legislative changes affecting infrastructure and policy include the Great Lakes Intra-basin water transfer regulations, *Lake Simcoe Protection Act* regulations, and Provincial Transportation Planning Policy statement. Other triggers could include:

- Project changes, including cost estimates updates or inclusion of new projects requiring update to the Development Charge Bylaw (background report roughly every 3 years)
- Provincial and Federal EA and/or funding changes affecting key infrastructure projects (e.g., Yonge subway, York-Durham Sewage System (YDSS))
- Population and employment forecast changes after each Census data release
- Climate change and global events affecting growth projections
- Major Official Plan Amendments adopted by local or Regional Councils affecting infrastructure identified in the Master Plans
- Socio-economic changes affecting the location or rate of future growth
- Major delay in the progress of key projects in the current Master Plan, (e.g. Upper York Servicing Solutions (UYSS))
- Changes in key infrastructure agreements, (e.g. Regional/Municipal/external)
- Technological advances in wastewater treatment technology

Existing processes in place can act as defacto mechanisms for updating the information in the Master Plans

There are existing processes in place for updating the information in the Master Plans such as Secondary Plans/ Regional Official Plan Amendments (ROPA), 10 year capital plans, business plans and 5-year service plans.

The ROP sets population growth targets for each local municipality. The Transportation Master Plan Update and the Water & Wastewater Master Plan Update recommends infrastructure based on these population growth targets which are translated into the 10 Year Roads, Water and Wastewater Capital Plans prepared on an annual basis. For example, the quarterly Water & Wastewater Infrastructure Status Report from the Environmental Services Department tracks the implementation status of the critical new

water and wastewater infrastructure that was recommended in the Master Plan and the 10-year Capital Plan.

Changes to the capital projects in terms of cost estimate and timing are made each year accounting for implementation conditions and current construction costs. They provide an opportunity for the information in the Master Plan to be updated. Cost estimates are also updated as part of a DC Bylaw update. These changes can be accumulated and consolidated into the next Master Plan update.

Annual review and monitoring will document changes to the Master Plan implementation and determine whether updates of the Master Plans are needed

The annual monitoring reports such as the transportation and water and wastewater supply and demand monitoring reports provide an opportunity for an annual review of the Master Plan implementation and any changes in project specific conditions. The Water & Wastewater Supply and Demand Monitoring Report tracks the water and wastewater system demands versus the available servicing capacity on a community/service area basis and highlights areas for further evaluation. Transportation demand monitoring will also be carried out on a regular basis and will present demand and capacity conditions in critical areas of York Region.

These monitoring reports will review performance measures, progress of capital project implementation, and changes in short/medium/long term priorities, and document the impacts to the Master Plan. These monitoring reports could include an assessment of the conditions that may trigger an update to the Master Plans.

The review and approval of secondary plans provide another opportunity to assess changes to the Master Plans

They may include changes in population and development that are different from the assumptions used in the Master Plan. For example, the Richmond Hill/Langstaff Urban Growth Centre is being planned for a significantly larger population than was assumed in the Master Plan. This may result in significant changes in transportation and water and wastewater servicing infrastructure timing and needs for that sub-area. Therefore the Master Plan recommendations for this sub-area would then need to be updated. This process can maintain the long term planning integrity of the Master Plan recommendations while allowing flexibility in shorter and intermediate term timing of key infrastructure to be phased in with development. This would reduce the need for a full comprehensive Master Plan update.

A review of the Master Plan should be done at the 5-year mark to determine the need for a detailed formal review and/or updating. Other changes to the Master Plan can be accumulated at any point within the 5-year cycle

There should be a review of the Master Plan at the 5-year mark or sooner to determine the need for a detailed formal review and/or comprehensive updating. However as there has been an annual review through the monitoring reports and other processes, the review at the 5-year mark need not be a major exercise unless major changes identified through the potential triggers have occurred. The update could consolidate accumulated changes and new information during the 5-year cycle for the Master Plans similar to the OPA and ROP Update consolidation process. Public consultation and notices of meetings at Committees of Council would be needed for adoption of the changes to fulfil the requirements of the Municipal Class EA process. Future updates to the Infrastructure Master Plans can be coordinated with an ROP update, DC Bylaw update, or more frequently as determined through the framework shown in *Council Attachment 1*. At the very least, the major updates to the Master Plans would be coordinated with an ROP update.

Updates to the Pedestrian and Cycling Master Plan (PCMP) should also follow this framework

Implementation of the cycling network is tied very much to the implementation of the Transportation Master Plan through road and rapid transit projects. As such, changes to the Transportation Master Plan would likely lead to corresponding changes in the PCMP. Thus, updates to the PCMP would also follow the framework for the updates of Infrastructure Master Plans.

Best practices review of other jurisdictions suggests that York Region's proposed framework provides greater flexibility with its iterative process

Most jurisdictions in Ontario and elsewhere in Canada update their Master Plans at the 5 to 10 year intervals. Each update is a full comprehensive exercise or technical update. The City of Ottawa is an example of a jurisdiction where more frequent reviews of capital works and programs are carried out. Their Ten-Year Transportation Outlook summarises the key performance of themes and highlights priority actions with a three-to five-year window to enable and address long-term, mid-term, and short-term objectives. York Region's proposed framework uses extensive monitoring and is therefore more iterative when compared to other jurisdictional practices.

5. FINANCIAL IMPLICATIONS

This report does not have any direct financial implications. However, the proposed framework generally means more efficient use of resources.

6. LOCAL MUNICIPAL IMPACT

There is ongoing coordination with local municipalities when the Region conducts its reviews of development applications. This includes coordination of local and Regional infrastructure projects to provide adequate transportation and water and wastewater servicing for population growth. More frequent updates of the information in infrastructure master plans would be useful to facilitate local development plans.

7. CONCLUSION

Staff seek Regional Council endorsement of a framework for updating the Infrastructure Master Plans. The framework identifies potential triggers to be reviewed for determining whether a Master Plan Update should be done on a more frequent basis than the normal 5-year cycle. It also uses existing processes such as the 10-year capital plans for updating the information in the Master Plans. At a minimum a full-fledged Master Plan review should be done on a 5-year cycle to determine if a comprehensive update is required.

For more information on this report, please contact Loy Cheah, Director, Infrastructure Planning at 905-830-4444, Ext. 5024.

The Senior Management Group has reviewed this report.

(The attachment referred to in this clause is attached to this report.)

Framework for Updating Infrastructure Master Plans

