



# Integrated Community Sustainability Planning

**A Guide**



# Integrated Community Sustainability Planning

This Integrated Community Sustainability Planning Guide was developed by The Natural Step Canada.

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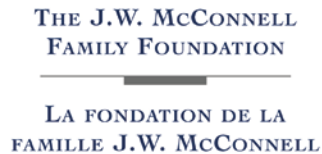
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## Note to Reader

### Welcome to the **Integrated Community Sustainability Planning Guide!**

Sustainability is about creating the kind of world we want for ourselves, our neighbours, and future generations. It involves living our lives and making decisions as individuals, organizations and societies so that the quality of life available to future generations is equal to – or even exceeds – what we inherited from our ancestors.

Communities are complex systems that comprise a diversity of stakeholders and interests and deliver a multitude of goods and services. The community level is also where people are most connected, where impacts are often felt first and where major infrastructure decisions are made that shape our day-to-day lives.

The sustainability challenges facing Canadian communities are unprecedented. Continual growth in major city centres coupled with shrinking populations in rural communities, rising greenhouse gas emissions, falling incomes of immigrant families, summer water shortages, declining participation rates in democratic forums and elections, surging energy demands, rising rates of obesity, increased air and water pollution, waste management issues and a widening gap between wealthy and poor families all present serious risks to quality of life both today and in the future. In this context, the need for an integrated approach to community planning has become increasingly obvious to municipalities and citizens across Canada.

*“The question of reaching sustainability is not whether we will have enough energy, enough food, enough tangible resources - those the Earth can provide. The question is: will there be enough leaders in time?”*

**- Dr. Karl-Henrik Robèrt, Founder of The Natural Step**

The good news is that we already have all the knowledge, tools and resources we need to create sustainable communities and a sustainable society. The bad news is that the longer we wait, the harder it will be to change, and we are short of the leadership needed to make real change happen.

When it introduced the term “Integrated Community Sustainability Planning (ICSP)”, with the creation of the federal-provincial gas tax agreements, the Government of Canada defined it as:

*“A long-term plan, developed in consultation with community members that provides direction for the community to realize sustainability objectives it has for the environmental, cultural, social and economic dimensions of its identity.”*

Pioneering ICSP efforts have engaged citizens and community stakeholders in a dialogue on the sustainable future of their community, where sustainability is achieved not through a variety of discrete actions in diverse sectors, but rather by finding integrated approaches that produce multiple impacts and benefits.

The Natural Step believes that transformational change at the community level is the most effective way to foster change towards sustainability overall. **The purpose of this guide is to help you lead a community through a transformational change process through the development of an Integrated Community Sustainability Plan.** As such, the guidebook shares lessons learned, tools, case studies and other resources to support the process. Much of the



## Note to Reader

material in the guide comes directly from the Alberta Urban Municipalities Association (AUMA)'s guidebook on Municipal Sustainability Planning ([www.msp.auma.ca](http://www.msp.auma.ca)), which The Natural Step authored in 2006 and which is based on the backcasting approach of The Natural Step Framework. This guide incorporates some new lessons learned by The Natural Step from communities across the country since the writing of the AUMA guide.

Although there is a certain logical flow to phases in the guide, it is not necessarily intended to be a step-by-step set of instructions as much as an overview of key elements to consider in developing a community's ICSP process.

Before moving along in the guide, it's important to keep the following in mind:

- This guide provides an overview of a community transformational change process. There are many additional tools, concepts and metrics for sustainable development that will complement the change process outlined here. Many of them are noted throughout the guide;
- Communities differ widely in size, geography, infrastructure and culture and are at different points in their sustainability journeys. While this guide lays out the key phases of an ICSP process overall, the process itself is flexible, scalable and can be adjusted to suit your community's "readiness." The guide provides a variety of engagement options for different phases to show how it can work in different scales in different communities.
- The intended outcome from the process laid out in this guide is not simply an ICSP document, but rather the development of an ICSP *framework* that can be built on over time and is adaptable to a community's changing circumstances and momentum around sustainability.
- This guide is intended for use by a group of people who can collaborate on the process. Ideally, the group will be diverse, with members coming from different parts or sectors of the community; and
- A commitment of roughly 6 - 12 months is expected to complete the process described in the guide.

The approach outlined in this guide has been refined through eight years of application with a number of Canadian communities, is grounded in over 20 years of research and practical application and is based on the contributions of experts, business professionals and community leaders from across Canada and around the world. Although a brief review of core concepts of The Natural Step Framework is provided, this guide will be most useful to you and your community if you have:

- Read The Natural Step Sustainability Primer, available online at [www.thenaturalstep.org/en/canada/toolkits](http://www.thenaturalstep.org/en/canada/toolkits);
- Completed The Natural Step online course, Sustainability: Step by Natural Step available at [www.thenaturalstep.org/elearning](http://www.thenaturalstep.org/elearning);
- Previous experience working with The Natural Step Framework;
- Received training in The Natural Step Framework, for example through The Natural Step's certificate courses (<http://www.thenaturalstep.org/en/canada/take-the-lead-in-sustainability>) and;
- Established a partnership with The Natural Step advisory or associate services team to help guide you through this process.

To find out more about any of these opportunities, visit [www.thenaturalstep.org/canada](http://www.thenaturalstep.org/canada). While The Natural Step Framework provides a foundation for the approach in this ICSP guide, the guide makes it clear that the TNS Framework can and should be used in conjunction with other tools and concepts for community sustainability.



## Note to Reader

The Integrated Community Sustainability Plan that you develop is only the beginning of your sustainability journey. Becoming a sustainable community is an ongoing, iterative process that involves incorporating sustainability deep into the fabric of the whole community and all of its systems, processes, practices, products, decisions, budgets and plans. As you progress, you may want to consider seeking ongoing technical assistance in developing your comprehensive plan, hosting workshops and education sessions on the topic of sustainability or using additional resources and tools to support your work. If you require a more detailed analysis or assistance in your sustainability journey, we invite you to contact The Natural Step Advisory Team or consider joining our Learning Network by emailing [info@naturalstep.ca](mailto:info@naturalstep.ca).

Good luck on your journey!



# Table of Contents

Note to Reader .....	3
Table of Contents .....	6
The Natural Step Framework: A Review of Core Concepts.....	8
Integrated Community Sustainability Planning – An Overview .....	13
Types of ICSPs .....	13
Lessons Learned about Effective ICSPs.....	13
ICSP Framework.....	16
ICSP Phases .....	17
Capacity-building Throughout the ICSP Process.....	17
<i>Phase I.</i> The Invitation.....	21
<i>Phase II.</i> Structuring the Process.....	25
<i>Phase III.</i> Community Visioning.....	32
<i>Phase IV.</i> Understanding the Sustainability Gap for Key Community Systems .....	39
<i>Phase V.</i> Identifying Strategies and Initiatives to Bridge the Gap.....	47
<i>Phase VI.</i> Continuing the Journey and Monitoring Progress .....	52
Closing .....	56
Appendix 1: Backcasting Elaborated .....	57
Appendix 2: Federal and Provincial ICSP Resources.....	60
Appendix 3: Emerging Sustainability Issues Exercise .....	62
Appendix 4: Composition of a Citizens Advisory Group .....	64
Appendix 5 : How Various Sustainable Communities Principles and Approaches Relate .....	65
Appendix 6: Sample Council Resolution .....	67
Appendix 7: Example of a Sustainability Declaration .....	69
Appendix 8: imagineCALGARY’s Visioning Process.....	70
Appendix 9: Canmore’s Visioning Process.....	72
Appendix 10: Writing Vision Statements.....	74
Appendix 11: Sample Vision Statements.....	75
Appendix 12: Facilitator’s Notes to Identify Community Systems .....	78
Appendix 13: Tips on Engaging Task Forces Systems .....	80



# Table of Contents

Appendix 14: Lessons Learnd on Participant Engagement .....	82
Appendix 15: How to Develop a Description of Success .....	84
Appendix 16: Lessons on Descriptions of Success.....	87
Appendix 17: Example Description of Success – Williams Lake, B.C. ....	89
Appendix 18: Example Description of Success – Whistler, B.C.....	90
Appendix 19: How to Develop a Description of Current Reality .....	91
Appendix 20: Guiding Questions for the Four Sustainability Principles .....	96
Appendix 21: Guiding Questions for Assets Inventory .....	101
Appendix 22: Lessons on Descriptions of Current Reality.....	102
Appendix 23: Example Description of Current Reality – Williams Lake, B.C. ....	104
Appendix 24: How to Select Performance Indicators and Targets.....	106
Appendix 25: Opportunities for Action.....	108
Appendix 26: Sources for Innovative Actions .....	109
Appendix 27: Guidance on Prioritizing Initiatives.....	111
Appendix 28: Using the 3 Strategic Questions to Assess Initiatives	
- Case Study of Whistler’s Natural Gas Pipeline.....	113
Appendix 29: Sustainability Filter .....	116
Appendix 30: Action Implementation Summary Table .....	117
Appendix 31: Example ICSP Partnership Agreement.....	118
Appendix 32: A Case Study in Community Partnership - Whistler .....	119
Appendix 33: Resources for Sustainability Reporting .....	121
Appendix 34: Integrating Existing Planning Processes .....	122
Appendix 35: Best Practices: Governance and Decision Making .....	124
Appendix 36: Additional Resources.....	125
About The Natural Step .....	126

# The Natural Step Framework: A Review of Core Concepts

The process for integrated community sustainability planning outlined in this guide is based on a planning approach called “backcasting from sustainability principles” – an approach made familiar to many as The Natural Step Framework. Backcasting is a methodology for planning that involves starting from a description of a successful outcome, then linking today with that successful outcome in a strategic way and asking: what shall we do today to get there?

The Natural Step Framework is a comprehensive model for strategic planning and decision making. It combines a rigorous, science-based understanding of sustainability with a tested planning approach to create real and transformative change. While this guide describes a process where the scope of the application of the framework is relevant for a community, a similar process can also apply on different scales, such as for a business, a department, a product or an industry.

There are five core concepts in The Natural Step Framework, which are explained in brief on the following pages. Remember that this is only a review, and that you should have a strong familiarity with The Natural Step Framework before you begin the process outlined in this guide.

The remainder of this guide will equip you with the tools to move toward sustainability in your community by applying Backcasting from Sustainability Principles through integrated community sustainability planning.

## Going Deeper

Take a look at the The Natural Step Sustainability Primer and the Planning for Sustainability Guide ([www.thenaturalstep.org/en/canada/toolkits](http://www.thenaturalstep.org/en/canada/toolkits)) for more information on The Natural Step Framework as well as the Sustainability 101 eLearning Course ([www.thenaturalstep.org/elearning](http://www.thenaturalstep.org/elearning)).

## Core Concept Review

### 1. The Sustainability Challenge

Increasing pressures on communities and organizations as a result of society’s unsustainable path.

### 2. Backcasting

A planning process in which today’s plans and decisions are driven by a vision of successful outcome in the future.

### 3. The Sustainability Principles

The four principles provide the constraints within which society can operate sustainably. Communities and organizations can adopt these principles to help guide their planning and decision-making processes.

### 4. Backcasting from Sustainability Principles

Backcasting means beginning with the end in mind. The sustainability principles help planners agree on where a community or organization needs to be in the future and understand where it is today so they can make decisions and plan strategically toward sustainability.

### 5. ABCD Planning Process

A practical process to move efficiently, effectively and economically from theory to action. This method is based on backcasting from sustainability principles and consists of four steps which are repeated as the community or organization moves toward sustainability: Awareness... Baseline Analysis... Compelling Vision... Down to Action.



# The Natural Step Framework: A Review of Core Concepts

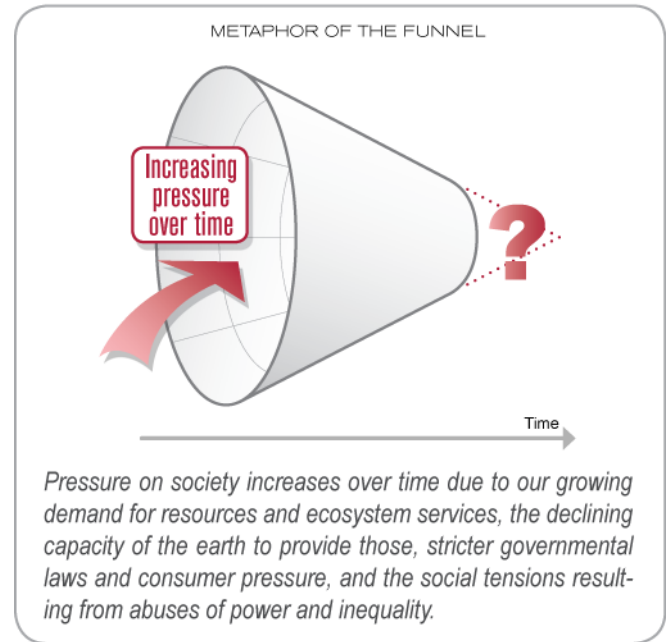
## Key Concept #1: The Sustainability Challenge

While the past century has brought extraordinary improvements in human health and medicine, public education and material well-being, the unintended side effects of our progress have been the destruction of ecosystems, the undermining of human needs and a way of life that cannot continue for much longer. The consequence of living beyond the planet's means is that ecosystems are being run down, resources are disappearing and waste is accumulating in the air, land and water. The resulting impacts – such as clean water shortages and climate change – are putting the well-being and development of all nations at risk.

A simple way of visualizing these challenges is to picture a funnel. The walls of the funnel represent the increasing pressures on us – our growing demand for resources and ecosystem services, the declining capacity of the earth to provide those resources and services, stricter governmental laws and consumer pressure and the social tensions resulting from abuses of power and inequality.

The most important element of this metaphor is the systematic nature of the pressures we face. There are many different problems, but the overall trend is that these problems are becoming increasingly common and increasingly severe because they are a direct result of the way our society grows and develops.

The sustainability challenge is to avoid 'hitting the walls' while reducing the pressures so the funnel can open up again. For communities, the funnel phenomenon may manifest itself in a wide array of challenges – from rising costs for energy and waste disposal, to exposure to new risks associated with changing weather patterns, to increasing demands on social services and infrastructure.



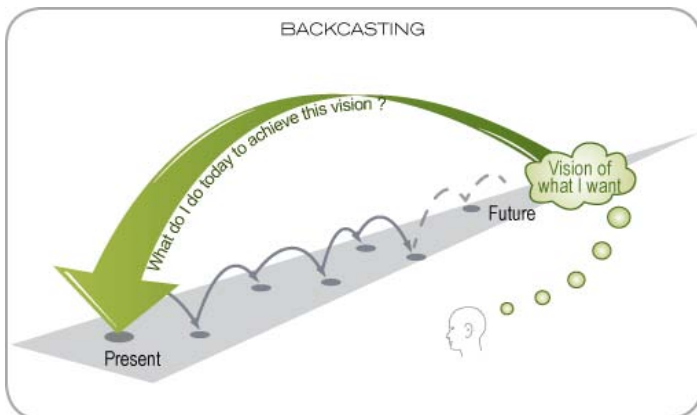
## Expanding your Toolbox

There are many different tools and resources to help you on your sustainability journey. The section that follows will reference many tools and concepts that support community sustainability planning. In addition to these, additional research into personal leadership, adult learning, organizational change, facilitation, group dynamics and systems thinking will help you make this planning process all the more inspiring and productive. A list of resources can be found at the end of the document in *Appendix 36*.

# The Natural Step Framework: A Review of Core Concepts

## Key Concept #2: Backcasting

Backcasting is a planning process in which today's plans and decisions are driven by a vision of successful outcome in the future. It's about developing a shared sense of purpose and clear understanding of success, and then striving boldly to reach that goal, as opposed to simply aiming to make marginal improvements over what was done yesterday.



“Backcasting” is basically about beginning with the end in mind. It refers to the process of deciding on what we want in the future and then figuring out what we have to do today to get there. Most of us backcast automatically as individuals, but when we plan for the future in larger groups, such as communities, municipalities or businesses, we tend to rely heavily on forecasting instead. Forecasting involves using past information to establish trends, projecting these trends out into the future and then developing a plan based on our best guess about what the future holds.

Forecasting is effective if we are happy with how things are going. But when we want or need a very different future than the one we are headed toward – such as our current unsustainable path - we need to backcast. This starts by agreeing on the conditions that will make us successful.

*Appendix 1: Backcasting Elaborated* provides further background and detail on the backcasting methodology.

## Key Concept #3: The Sustainability Principles

The Natural Step Framework is based on defining the system conditions for a sustainable society. These are derived from scientific consensus and they are the non-negotiable conditions for success. We call these sustainability principles. They were developed specifically to assist with backcasting and provide explicit guidance for any individual or organization interested in moving toward sustainability. Since the principles are the result of broad scientific consensus, they help frame a goal that people and organizations all over the world can share. If we can agree on those principles as the basic criteria for a sustainable society, they become our starting point and help us evaluate our ideas and plan for the future while making the most effective and efficient use of our resources. The good news is that there are only four principles and all impacts, issues and other principles can be related to these four basic principles. *Appendix 5* explains how other examples of more process-related principles and tools for the development of sustainable communities relate to these four basic principles and can be used in a complimentary way.

### SYSTEM CONDITIONS FOR SUSTAINABILITY

In a sustainable society, nature is not subject to systematically increasing...



...concentrations of substances extracted from the earth's crust,



...concentrations of substances produced by society,



...degradation by physical means,

and, in that society...



...people are not subject to conditions that systematically undermine their capacity to meet their needs.

# The Natural Step Framework: A Review of Core Concepts

Manfred Max-Neef, a Chilean economist, respected researcher into human needs and winner of the prestigious Right Livelihood Award, has defined the nine fundamental human needs below which are considered to be universal across all cultures and historical time periods. What changes across cultures and time is how we satisfy these needs.



## Key Concept #4: Backcasting from Sustainability Principles

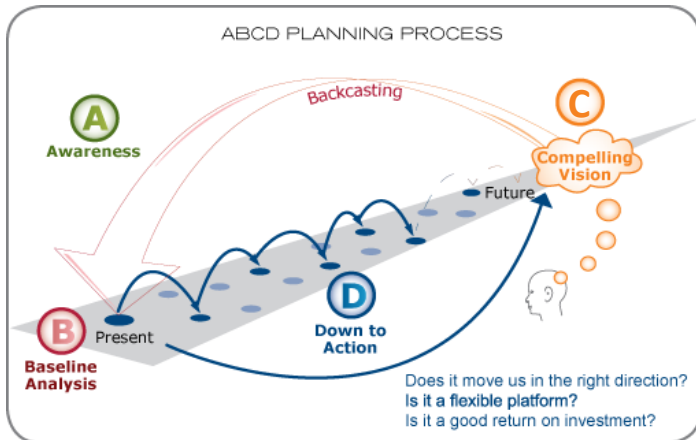
To use the sustainability principles for backcasting, we translate them into long-term goals toward which our community or organization can work, and then begin taking action to move in that direction. This means that our community or organization's sustainability goals are to:

1. **Reduce and eventually eliminate our contribution to the systematic accumulation of materials from the earth's crust.** This means substituting our use of certain minerals that are scarce in nature with others that are more abundant, using all mined materials efficiently and systematically reducing our dependence on fossil fuels.
2. **Reduce and eliminate our contribution to the systematic accumulation of substances produced by society.** This means systematically substituting certain persistent and unnatural compounds with ones that are normally abundant or break down more easily in nature, and using all substances produced by society efficiently.
3. **Reduce and eliminate our contribution to the ongoing physical degradation of nature.** This means drawing resources only from well-managed eco-systems, systematically pursuing the most productive and efficient use of those resources and land and exercising caution in all kinds of modifications of nature, such as over-harvesting and the introduction of invasive species.
4. **Reduce and eliminate our contribution to conditions that systematically undermine people's ability to meet their basic needs.** This means offering products and services and changing practices, suppliers, and business models to those that ensure that human rights are respected, living wages are paid, safe and healthy work environments are provided and living conditions allow local communities to meet the needs of citizens.

# The Natural Step Framework: A Review of Core Concepts

## Key Concept #5: The ABCD Planning Process

The ABCD planning process is how we put backcasting from sustainability principles into practice. The process involves four basic steps: **A**wareness, **B**aseline Analysis, **C**ompelling Vision and **D**own to Action.



**A** is building awareness and capacity, understanding what you're doing and getting everyone on the same page. **B** is assessing your baseline, which means understanding where you are today with respect to sustainability. **C** is creating your compelling vision, which includes meeting the principles of sustainability outlined above. **D** is prioritizing actions to bridge the gap between where you are and where you want to be in a sustainable future.

Although the steps are listed alphabetically as ABCD, they are not necessarily meant to be followed in a linear way. Most people find themselves revisiting each of these planning steps many times, as they move up a spiral of

change. Throughout these planning steps, the sustainability principles will help you to keep the end in mind as you tackle the multiple decisions involved in long-term planning. What's considered realistic and possible today shouldn't affect the direction of change, only its pace. What makes the backcasting approach outlined in this guide unique is that it allows you to build a strategic plan that incorporates the four basic sustainability principles, using the backcasting method to evaluate each possible action for its strategic value.

### The Spiral of Change: The Cyclical Nature of the ABCD

In practice, the ABCD process is cyclical, not linear, with each step helping to inform the others. For example, you may start simply by creating awareness (A) within the community and more specifically with participants in the planning process. The participants may work to create a high level baseline analysis (B) and a draft sustainability vision (C) for community input. During this time, this group may already begin to identify some early projects or prototypes (D) to implement. As the team demonstrates success with early projects, they may get support for more.

One of the key projects could be a broader training and awareness raising program (A) that targets key community stakeholders and partners, as well as a more in-depth analysis of community systems (B) and the development of strategic goals for the entire community (C) based on the draft developed by the initial team. As part of the review of the process to engage the community in the strategic goals, citizens and stakeholders can be invited to provide ideas and resources to implement them (D), and so on.

As your community spirals up the ABCD process, you will:

- Generate increasing engagement and awareness of sustainability and its relevance to the community (A);
- Clarify the gap between the current reality and the community's desired sustainable future. Looking back and forth between the community's aspirations and its current reality will help develop a creative tension between the two, sparking more ideas and innovations (B – C);
- Implement more and more smart moves toward sustainability, starting with the 'low hanging fruit' that are platforms for bolder initiatives in the future (D).

# Integrated Community Sustainability Planning

## An Overview

Community sustainability planning is about *transformative* change ... as well as incremental improvements. It is about a new way of thinking, making decisions and collaborating. It's a long-term process that requires leadership, shared commitment, hard work and sustained effort. Leaders and stakeholders need to think about their communities as systems, and be ready to embrace change if they are to advance the practice of sustainability. Integrated community sustainability planning is the perfect opportunity for a community to do so.

*“The perfect scale for the creation of socially and ecologically sustainable role models is at the municipality level. Communities hold the key to a sustainable world in their hands.”*

**-Dr. Karl-Henrik Robèrt, Founder of The Natural Step**

### Types of ICSPs

In some parts of Canada, municipalities have the option of preparing stand-alone ICSPs, collaborative ICSPs in partnership with adjoining municipalities or to update their existing Municipal Plan (i.e. Official Plan, Municipal Development Plan, Municipal Planning Strategy, Official Community Plan etc... hereafter referred to as “Municipal Plan”) and use it as a basis for an ICSP.

Although this guide is intended primarily for those communities who choose to develop stand-alone ICSPs or collaborative ICSPs, it can also be used as a framework to guide the process of identifying policies to incorporate into an existing Municipal Plan. This approach, however, tends to limit the scope of the ICSP to dealing with policy matters related primarily to land use, whereas a stand-alone ICSP or collaborative ICSP creates greater opportunities for viewing the community or region from a holistic and integrated perspective and identifying strategies and actions that go well beyond the authority of a Municipal Plan. Further, stand-alone or collaborative ICSPs can identify strategies and actions to be implemented by a diversity of community partners and stakeholders that in turn can help to move all aspects of the community or region in the direction of sustainability.

### Lessons Learned about Effective ICSPs

**There is no single way to develop an ICSP, and each community will tackle it differently.** However, it is clear that to bring about the kind of community-level transformational change that is required by sustainability there are some basic elements that are necessary no matter what the approach. As thousands of Canadian communities embrace the challenge of becoming sustainable, of creating healthy, vibrant and safe places to live for today and tomorrow, the lessons are beginning to emerge about what makes for effective sustainable community planning processes. Below are some of the lessons that The Natural Step has learned about what makes for effective ICSPs<sup>1</sup>. Examples of these lessons from across Canada are provided in table found on page 15. These lessons are consistent with tips and suggestions for effective community sustainability planning that appear in a number of other resources, such as the Alberta Urban Municipalities Association (AUMA)'s Municipal Sustainability Planning guidebook (p. 13 – *Common Elements of Successful MSPs*) and the Association of Municipalities of Ontario (AMO)'s Sustainability Planning Toolkit (*Step 2 – Review Lessons Learned*) and references listed in *Appendix 2: Federal and Provincial ICSP Resources*.

<sup>1</sup> These 7 lessons and the examples in the table found on page 16 were originally published in an article in *Alternatives Journal*, Volume 35, Number 5, 2009.



# Integrated Community Sustainability Planning An Overview

## ***Lesson 1: It's a JOURNEY, not a document***

Smart plans are about the process.

## ***Lesson 2: Invest in education and capacity building***

A small group of isolated people can't write a useful community sustainability plan. Instead, a strong core of community and process leaders requires a thorough understanding of sustainability, while a broad cross section of community members needs to follow the concept, if the effort is to be sustained.

## ***Lesson 3: Build shared intention***

A strong, shared vision of what the community wants is absolutely critical. But having a well-articulated vision statement isn't enough. The most successful efforts build a shared sense of purpose, commitment and intent.

## ***Lesson 4: Know your sustainability gap***

Sustainability isn't just about how far a community has come or even where it is heading. A community needs to understand the gap between where it is today and where it wants to be in a successful, sustainable future. The tension established by this "sustainability gap" is fundamental to the creativity and innovation necessary to find new ways forward. This "backcasting" planning often leads to questions and decisions that differ from those that emerge from more conventional planning.

## ***Lesson 5: Collaborate***

Sustainability requires unprecedented collaboration among a range of departments and sectors, citizens and other stakeholders.

## ***Lesson 6: Feed the momentum with strategic actions***

Early wins are essential if a community is to build and maintain momentum for the transformational change process. To achieve these incremental successes, it is important to clearly understand and communicate how actions taken today will move the community toward its vision of sustainability, how they are serving as flexible stepping stones, and how they are generating a positive return on investment.

## ***Lesson 7: Evaluate progress***

As a sustainable community initiative advances, progress needs to be measured. Effective feedback mechanisms will inform decision making, and help the community evaluate and adapt to the change process as it unfolds.

# Integrated Community Sustainability Planning

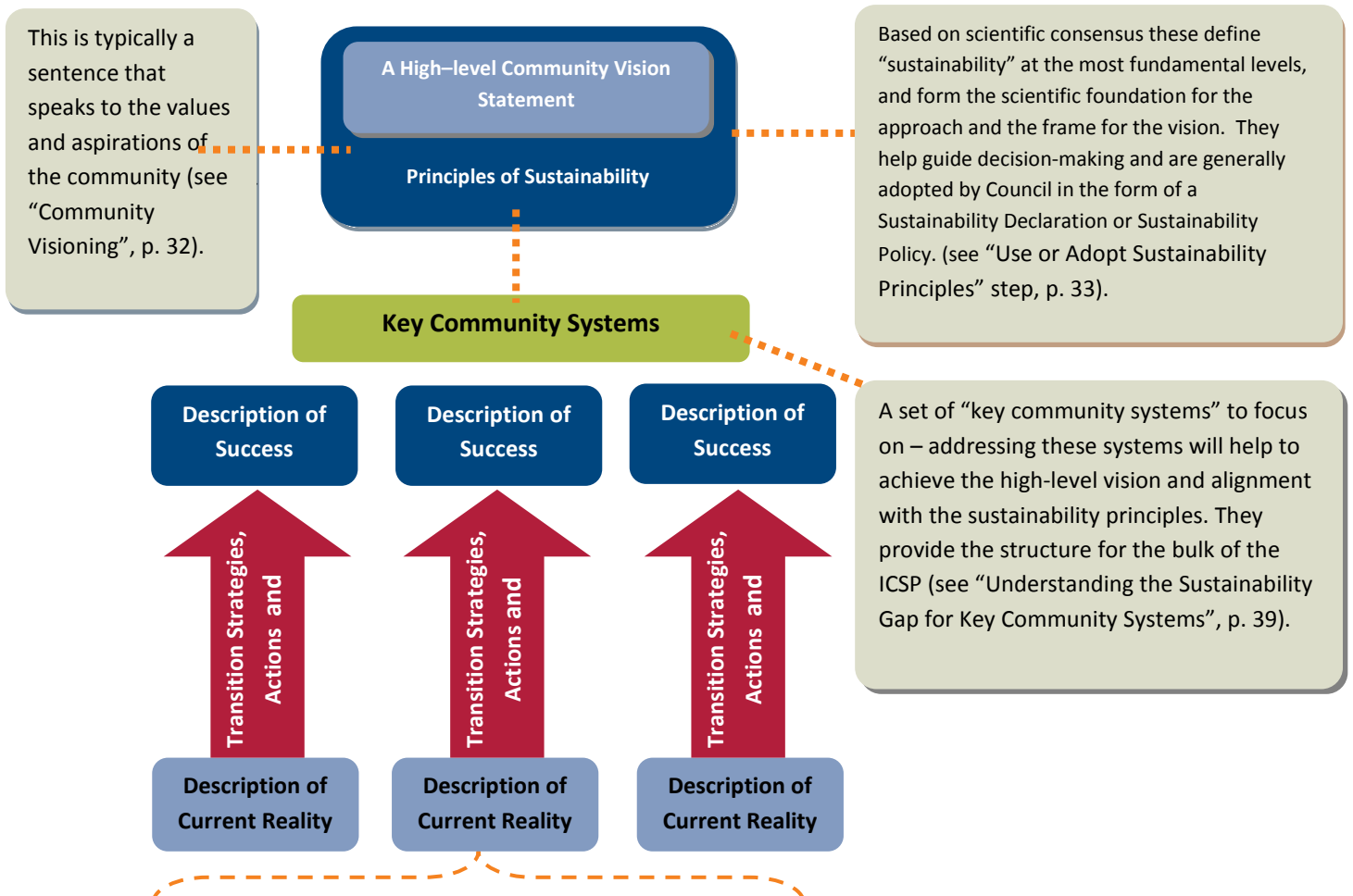
## An Overview

Lesson Learned	Example
<b>1. It's a JOURNEY, not a document.</b>	In Olds, Alberta (population 7500), the Olds Sustainability Living initiative adapted a sustainable community planning process laid out by the Alberta Urban Municipalities Association to suit the town's unique situation. While the process ultimately produced a document called <i>The Olds Strategic Sustainability Plan</i> , its greatest legacy is the shared sense of purpose and direction that has been created among partners and citizens. Led by the Town of Olds, in partnership with the Olds Institute, itself a collaborative association of major local institutions, the journey involves education and extensive consultation with citizens, including a special effort to reach out to groups often missed, such as seniors and youth.
<b>2. Invest in education and capacity-building.</b>	In the Town of Canmore, Alberta (permanent population of 12,000), nine businesses and community organizations dedicated teams of staff and managers who faithfully participated in a sustainability training program. This built a shared language within a broad group of organizations. It also helped develop the capacity of a few individuals to serve as ongoing sustainability experts for new community sustainability initiatives, such as a visioning process and creation of new development guidelines that incorporated sustainability.
<b>3. Build shared intention</b>	When Whistler, BC (permanent population of 10,000) developed its vision for the future, it was much more than a statement of Whistler as "the premier mountain resort community – as we move toward sustainability." Through extensive community consultation and partnership-building, Whistler developed a future scenario that is felt in the hearts and minds of citizens, and is deemed to be worthy of their ongoing investment of time and energy.
<b>4. Know your sustainability gap</b>	The Alberta Union of Municipalities Association's recommended approach to sustainability planning is rooted in the backcasting approach, and has guided dozens of communities in articulating their desired future and determining their priorities.
<b>5. Collaborate</b>	In the National Capital Region (population one million plus), the cities of Ottawa and Gatineau, and the National Capital Commission are partners in a long-term planning process called Choosing our Future. Despite the complexity of involving a pair of cities in two provinces and various orders of government, a regional, collaborative approach provides the best chance of creating lasting results for a sustainable future.
<b>6. Feed the momentum with strategic actions</b>	From eliminating the cosmetic use of pesticides to implementing a leading-edge waste management system, the Halifax Regional Municipality (population 375,000) has undertaken hundreds of initiatives, large and small, and gained broad recognition for its efforts. The municipality has developed a "sustainability filter" to ensure that sustainability considerations are factored into the design and planning of all projects, programs and activities.
<b>7. Evaluate progress</b>	Whistler, BC, created a monitoring and reporting system that tracks the community's status and progress towards the goals set out in its 2020 plan. A comprehensive list of indicators is published on the Whistler 2020 website for all to see.

# Integrated Community Sustainability Planning An Overview

## ICSP Framework

This guide introduces a basic ICSP framework to support an ongoing change process towards sustainability in a community. This ICSP framework is rooted in the backcasting approach of The Natural Step Framework and takes into account the seven lessons described above. The figure below outlines the main components of the ICSP framework – the key deliverables that would be produced by the community through the phases outlined in the next section.



For each “key community system”, there are four main deliverables. (for # 1, #2 and #3 see “Understanding the Sustainability Gap for Key Community Systems”, p. 39; for #4, see “Identifying Strategies and Initiatives to Bridge the Gap” p. 47)

1. A Description of Success that describes the state of the community system in the future, “*We will be successful when...*” (Some ICSPs refer to these as “end-state goals.”) Together, the Descriptions of Success for the various community systems represent a more detailed articulation of the community’s desired future expressed at a high level in the vision.
2. A Description of Current Reality that outlines the current challenges and assets, “*Our strengths and challenges are...*”
3. Key performance Indicators to help monitor progress toward the Description of Success.
4. Transition Strategies and specific Actions (initiatives, investments, etc) to close the gap between today and the desired, sustainable future.



# Integrated Community Sustainability Planning An Overview

## ICSP Phases

There are numerous ways that a community may organize itself to produce the deliverables of an ICSP outlined in the figure in the previous section, depending on the situation in the community. This guide therefore presents different process and engagement options – all with the same overall framework in mind - so that communities can design an ICSP process that is desirable and appropriate for them.

The Natural Step's experience suggests that no matter what the process a community ultimately decides to use, certain key elements should be undertaken to some extent. These key process elements are presented as "Phases" in the table on page 19. The community must decide, however, on the appropriate level of engagement and scope of activity for each phase in its context.

## Capacity-building Throughout the ICSP Process

Capacity building could almost be considered its own phase in the table on page 19 but is instead presented in a separate column because of its relevance in all of the other phases. It is extremely beneficial that everyone participating in an ICSP process, share in an understanding of the sustainability challenge, what sustainability is and the benefits of planning for sustainability. It is easier to move forward with the process when people see the relevance of sustainability to their own well-being and to the well-being of their community's businesses, organizations and future generations.

## The Natural Step Framework– A Key Piece of the Capacity-Building Puzzle

The Natural Step Framework helps develop a common language to talk about sustainability and generates awareness and education about key issues. The four sustainability principles outline the basic criteria for any community or organization to become sustainable. This shared understanding of sustainability – what it is and why we need to be moving toward it – is the foundation of effective, collective action.

Key areas to discuss are:

- the current sustainability challenge;
- the importance of systems thinking;
- the business case for sustainability;
- the need to pursue a vision-based path of growth/development; and
- how to move strategically toward success.

In addition to those mentioned above, additional resources, exercises and speaking notes are also available from The Natural Step website to help you share these concepts with others ([www.thenaturalstep.ca/en/canada/planning-guide-resources](http://www.thenaturalstep.ca/en/canada/planning-guide-resources)). You may also want to consider joining The Natural Step Learning Network or taking a course offered by The Natural Step through its Learning Programs. More information on these and other learning opportunities is available through The Natural Step website at [www.thenaturalstep.org/canada](http://www.thenaturalstep.org/canada). Also see *Appendix 1: Backcasting Elaborated* for a detailed explanation of the concept of backcasting and examples of why it can be an effective tool for strategic planning.

# Integrated Community Sustainability Planning

## An Overview

This helps develop a shared sense of purpose amongst participants and a common language which enables greater cooperation and collaboration in designing innovative solutions and ideas.

Capacity building around sustainability should therefore occur *throughout* the process as people become engaged with the various elements. Further, the level of capacity building need not be the same for everyone and will depend on their roles and responsibilities and level of engagement with the process.

It is important to also note that capacity building around sustainability is an ongoing process that can be enhanced through dialogue, presentation, collaboration and learning by doing. And it is something that manifests in many different ways amongst different individuals and groups of people.

**The desired outcome for capacity-building is for people to have the necessary knowledge, skills and commitment to fulfill their unique roles and responsibilities in the sustainability planning process**

Suggestions have been made throughout the guide for different levels of capacity building ranging from high-level awareness-building around sustainability intended for broad audiences, to half-day briefing sessions intended for leaders, senior staff and decision makers, to deeper levels of training along with practical application sessions that are intended for those working on particular aspects of the community plan. These are described in greater detail under each phase and summarized in the right-hand column in the table on page 19.

### Engaging “Early Adopters” in the Community

One way that a number of communities have begun the capacity-building process in the community is by using an “Early Adopters” model. Early Adopters are a group of leading stakeholders in the community -- local businesses, organizations, community groups, concerned citizens and municipal government -- who come together with a shared commitment to provide leadership by introducing and incorporating sustainability into their respective organizations and by working together towards community sustainability. An Early Adopters program builds community capacity by establishing a common understanding and shared language for sustainability among a variety of community stakeholders, creating local success stories and then supporting this core group of leaders to disseminate the lessons, knowledge and energy they have gained throughout the community. See <http://www.thenaturalstep.org/sites/all/files/early-adopters-program.pdf> for more information.

# Integrated Community Sustainability Planning

## An Overview

Phase	Desired Outcomes	Suggested Steps	Capacity –Building Suggestions
<b>I. The Invitation</b>	<ul style="list-style-type: none"> <li>The level of interest (or readiness) amongst community leaders, stakeholders and/or the community at large for collaborating on a community sustainability planning process is understood.</li> <li>Community leaders, stakeholders and/or the community at large are engaged in a discussion(s) about the community's future, aware of the relevance of sustainability to the community and have developed a shared sense of the need for community sustainability planning.</li> </ul>	<ol style="list-style-type: none"> <li>Engage often and consistently in conversations that build awareness of the relevance of sustainability to your community</li> <li>Explore the community's level of interest and readiness</li> </ol>	<ul style="list-style-type: none"> <li>Sustainability dialogue sessions on emerging sustainability issues (p. 22)</li> <li>Stakeholder for a and discussions on community's future and sustainability (p. 23)</li> <li>Early Adopters program to build common language (p. 18)</li> <li><i>Sustainability 101</i> eLearning course for interested parties</li> </ul>
<b>II. Structuring the Process</b>	<ul style="list-style-type: none"> <li>A preferred sustainability planning approach for your community has been decided upon and committed to.</li> <li>All key stakeholders have had an opportunity to contribute to the structuring of the ICSP process.</li> <li>The roles and responsibilities of various contributors to the ICSP process have been clarified in the form of a project governance plan.</li> </ul>	<ol style="list-style-type: none"> <li>Identify a Process Leader and/or Form a Process Leadership Team</li> <li>Begin to Develop a Common Understanding and Shared Language Around Sustainability</li> <li>Review the ICSP Guide and Assess Engagement Options</li> <li>Consult with municipal leadership</li> <li>Create a Governance Plan</li> <li>Explore community engagement options for key ICSP deliverables</li> <li>Decide on approach for engaging the broader community</li> <li>Finalize Structure of the Planning Process</li> </ol>	<ul style="list-style-type: none"> <li>Resources and training for building a common understanding of sustainability in the process leadership team (p. 27)</li> <li>ICSP orientation sessions for municipal leadership (p. 28)</li> <li>Training and orientation for Citizens Advisory Group and/or other stakeholders (p. 29)</li> <li>Awareness and communications campaigns for broader community (p. 31)</li> <li><i>Sustainability 101</i> eLearning course for interested parties</li> </ul>
<b>III. Community Visioning</b>	<ul style="list-style-type: none"> <li>A shared understanding of success for the community in a sustainable future and a shared intention to create that future has been developed amongst community members.</li> </ul>	<ol style="list-style-type: none"> <li>Use or adopt sustainability principles</li> <li>Decide on scope of visioning process</li> <li>Gather community input on the vision</li> <li>Synthesize input into a vision statement</li> </ol>	<ul style="list-style-type: none"> <li>Introductory briefing/training for Council on sustainability principles (p. 33)</li> <li>More detailed training on using the sustainability principles for those synthesizing feedback into vision and/or reviewing future scenarios (p. 37)</li> <li><i>Sustainability: Step by Natural Step</i></li> </ul>

# Integrated Community Sustainability Planning

## An Overview

		5. Communicate and celebrate the vision	<ul style="list-style-type: none"> <li>eLearning course for more detailed training</li> <li>Sustainability awareness sessions for public during community visioning process</li> </ul>
<b>IV. Understanding the Sustainability Gap for Key Community Systems</b>	<ul style="list-style-type: none"> <li>A determination has been made about which key community systems (e.g. energy, food, etc...) need to be addressed in order to achieve sustainability and the community's vision.</li> <li>A shared understanding of the gap between current reality and a successful, sustainable future has been established for the key community systems.</li> <li>Indicators have been identified that can be used to monitor progress towards success for each key community system.</li> </ul>	<ol style="list-style-type: none"> <li>1. Identify Community Systems</li> <li>2. Clarify Process and Deliverables</li> <li>3. Develop Descriptions of Current Reality for each Community System</li> <li>4. Develop Descriptions of Success for each Community System</li> <li>5. Select Performance Indicators and Targets</li> </ol>	<ul style="list-style-type: none"> <li>Detailed backcasting training for groups developing Descriptions of Success and Current Reality (p.44)</li> <li><i>Sustainability: Step by Natural Step</i> eLearning course for more detailed training</li> </ul>
<b>V. Identifying Strategies and Initiatives to Bridge the Gap</b>	<ul style="list-style-type: none"> <li>Short-term, medium-term and long-term strategies, initiatives and investments have been prioritized for integration into business plans and budgets of the municipality and other community partner organizations.</li> </ul>	<ol style="list-style-type: none"> <li>1. Generate Ideas for Initiatives and Investments</li> <li>2. Prioritize initiatives and investments based on strategic questions</li> <li>3. Feed momentum by implementing some "low-hanging fruit" actions immediately</li> <li>4. Compile priority initiatives into a single plan</li> </ol>	<ul style="list-style-type: none"> <li>Inspiring "proof of possibility" sessions to inspire creative thinking by reviewing examples and best practices (p. 48)</li> <li>Detailed training on backcasting for groups prioritizing actions (p. 49)</li> <li><i>Sustainability: Step by Natural Step</i> eLearning course for more detailed training</li> </ul>
<b>VI. Continuing the Journey and Monitoring Progress</b>	<ul style="list-style-type: none"> <li>A governance and partnerships approach has been established to guide the implementation of the ICSP in the community.</li> <li>The initiatives in the ICSP are being implemented in the community.</li> <li>Progress on the implementation of the ICSP is monitored and evaluated.</li> </ul>	<ol style="list-style-type: none"> <li>1. Form partnerships with community stakeholders around implementation</li> <li>2. Review the plan periodically</li> <li>3. Make a plan for implementation</li> <li>4. Report to stakeholders and celebrate success</li> <li>5. Ongoing integration of sustainability into operations</li> </ol>	<ul style="list-style-type: none"> <li>Introductory briefing/training for partners on ICSP process, community vision, sustainability principles, etc (p. 52)</li> <li>Regular introductory sustainability training for staff, partners (p. 55)</li> <li>Specific training on integration of sustainability into decision-making (e.g. sustainability filter) – (p. 55)</li> <li><i>Sustainability 101</i> eLearning course for interested parties</li> </ul>

# Integrated Community Sustainability Planning

## Phase I. The Invitation

The decision by a community to undertake a sustainability planning process is generally preceded by a series of interactions among community members that raise awareness about sustainability and its relevance to the community and build support for the idea of sustainability planning. Often, these interactions begin with one individual or a small group of concerned individuals, who may be members of Council, members of the public or municipal staff. This individual or group acknowledges the sustainability challenges facing the community and undertakes to raise awareness and build support for the need for sustainability planning. Such efforts that have been most successful are those that combine facts and knowledge about sustainability with an “invitation” to other community members to explore together their relevance to the community.

### Desired Outcomes

- Community leaders, stakeholders and/or the community at large are engaged in a discussion(s) about the community’s future, aware of the relevance of sustainability to the community, and have developed a shared sense of the need for community sustainability planning.
- The level of interest (or readiness) amongst community leaders, stakeholders and/or the community at large for collaborating on a community sustainability planning process is understood.

### Suggested Steps

Phase I – The Invitation	
Step:	Tools / Worksheets:
1. Engage often and consistently in conversations that build awareness of the relevance of sustainability to your community.	<i>Appendix 3:Emerging Sustainability Issues Exercise</i>
2. Explore the community’s level of interest and readiness.	
Phase II - Structuring the Process	
Phase III – Community Visioning	
Phase IV – Understanding the Sustainability Gap for Key Community Systems	
Phase V – Identifying Strategies and Initiatives to Bridge the Gap	
Phase VI – Continuing the Journey and Monitoring Progress	

# Integrated Community Sustainability Planning

## Phase I. The Invitation

1. *Engage often and consistently in conversations that build awareness of the relevance of sustainability to your community.*

In the early stages, the best approach to building awareness of the relevance of sustainability to your community is through formal and informal dialogue. The aim is to create a sense that the challenges and opportunities of sustainability have personal and professional meaning to members of the community.

As people in your community see how sustainability relates to their own well being and to the well being of their businesses, organizations and future generations, they are more likely to be drawn into the conversation and feel a sense of ownership of the sustainability journey. Depending on the audience, preparing statistics and graphs that relate directly to their community may be an effective tool. Other audiences may respond better to storytelling and anecdotal information.

### Hints & Tips

Remember, you usually don't need to tell people about the case for sustainability as you see it. Rather, ask them their thoughts, ideas and concerns around sustainability. While some internal and external data may be useful to justify why change is important to your community's well being, an approach of using dialogue to explore these ideas will allow people to draw their own conclusions about the relationship between global sustainability and the future of the community.

### Potential Benefits Abound

Based on studying the opportunities captured and savings incurred by hundreds of organizations around the world, author Bob Willard has developed a compelling business case for sustainability. His research reveals seven key areas where a sustainability strategy will benefit an organization's bottom line. Though they are expressed with for-profit enterprises in mind, most of them are also relevant in the public sector. This material can also be used to help engage businesses as partners in an ICSP process.

1. Reduced recruiting costs -1%
2. Reduced attrition costs -2%
3. Increased employee productivity +10%
4. Eco-efficiencies in manufacturing -5%
5. Eco-efficiencies at commercial sites -20%
6. Increased revenue-market share +5%
7. Lower insurance & borrowing costs -5%

Willard notes that his conservative estimates indicate these savings can yield a profit increase of at least 38 per cent. While it will take time and resources upfront to capture such benefits, these concrete figures make a strong economic argument for why any organization should adopt sustainability as a strategic goal.

*Adapted from Willard, Bob. 2009. The Sustainability Champion's Guidebook: How to transform your company. New Society Publishers, Gabriola Island, British Columbia, Canada. p. 28-29. Used by permission.*



# Integrated Community Sustainability Planning

## Phase I. The Invitation

Consider the following approaches:

- Begin or contribute to a dialogue with queries like these:
  - What are the biggest challenges our community is facing?
  - Have you heard of examples of how other communities have dealt with similar challenges?
  - Do you think we have a shared sense of where we're trying to get to as a community? Of how we'll address our challenges over the long-term?
  - What does sustainability mean to you? To our community?
  - How do you feel sustainability initiatives can help our community address our challenges?
- Identify some key areas where sustainability applies to the community. If the opportunity presents itself in a meeting context, use the exercise in *Appendix 3: Emerging Sustainability Issues Exercise* to help. The results of this exercise will help build the case for sustainability, and communicate how risks can be avoided and opportunities maximized if a vision of sustainability is realized.
- Identify and share relevant examples and case studies of other communities that have undertaken successful community sustainability initiatives – if possible, invite representatives from those communities to present in your community.

### 2. Explore the community's level of interest and readiness.

If sufficient “buzz” has been created around sustainability in the community, Council may wish to engage in dialogue with key community stakeholders and/or the community at large to determine their level of interest to participate in a broader community sustainability planning process. If such is the case for your community then:

- Ask yourself: Who are the people, organizations, businesses and other community stakeholders who can help? Who needs to be at the table for the community to build momentum around its sustainability journey?
- Invite them to a forum or discussion(s) about the community's future, the sustainability challenge, the business case for sustainability and how planning for sustainability can help address these challenges. The desired outcome of this session(s) would be to:
  - build awareness around sustainability and of community sustainability planning
  - gauge the level of interest and commitment for participating in a community sustainability planning process

# Integrated Community Sustainability Planning

## Phase I. The Invitation

### Hints & Tips

#### 7 Practices of Sustainability Change Leaders

**Get credible, stay credible:** It is important to establish your personal credibility early on. You must earn the right to lead the sustainability transformation. Leadership is about influence and relationships based on trust. Trustworthy, credible leaders are honest, forward-looking, inspiring, and competent. You need to build trust quickly.

**Dialogue:** Developing persuasion/selling skills that allow you to influence others makes you a more effective leader. You must be able to use dialogue to advocate for breakthrough sustainability goals and a culture of sustainability. Dialogue reminds us that communication is a two-way street with many interesting intersections, not a one-way, dead-end alley.

**Collaborate, educate, network:** People collaborate when it is in their self-interest to do so, so you want to connect peers with purpose. People who share a compelling vision of the entity you are trying to move toward sustainability will work together, share resources, reallocate budgets, and contribute expertise because they want to make their common dreams come true. They need each other's help and connections to make it happen.

**Meet them where they are:** Inevitably, you will face opposition. Opposers think your proposals are wrong for the business and /or wrong for them personally. When you confront different worldviews, talk the jargon of the opposers and show how sustainability strategies are relevant to their priorities.

**Piggyback existing initiatives:** In some companies, hitching your sustainability wagon to an existing high-profile horse will help move it in the right direction. Wherever possible, use existing processes. This allows easy access to resources and know-how, and helps create support by getting more of the mainstream organization involved.

**Influence the influencers:** It is nearly impossible to accomplish transformation to a sustainability culture without long-term buy-in and active support from a majority of the network of formal and informal power brokers in the organization. Work the chain of influence leading to the key people. Use the "Collaborate, Educate, Network" practice. Start with your network of kindred spirits and their contacts; then collaboratively find paths through the chain of influence that connects to senior gatekeepers.

**Practice 'Planful Opportunism':** work the chain of influence leading to the key people. Use the "Collaborate, Educate, Network" practice. Start with your network of kindred spirits and their contacts; then collaboratively find paths through the chain of influence that connects to senior gatekeepers. Be opportunistic and adapt to new circumstances as they arise. Be flexible about timing and paths to success, but do not budge on achieving real progress toward your visionary sustainability goals.

*Adapted from Willard, Bob. 2009. The Sustainability Champion's Guidebook: How to transform your company. New Society Publishers, Gabriola Island, British Columbia, Canada. p.35 -50 . Used by permission.*



# Integrated Community Sustainability Planning Phase II. Structuring the Process

*"Organizing is what you do before you do something, so that when you do it, it is not all mixed up."*

- A. A. Milne, Humorist

There is no one way to undertake an ICSP process and each community will tackle it differently. The structure of your process should therefore reflect the community's level of interest and readiness for participating in and committing to integrated community sustainability planning.






## Desired Outcomes

- A preferred sustainability planning approach for your community has been decided upon and committed to.
- All key stakeholders have had an opportunity to contribute to the structuring of the ICSP process.
- The roles and responsibilities of various contributors to the ICSP process have been clarified in the form of a project governance plan.

## Levels of Community Engagement

The scope of your ICSP process, and therefore the human and financial resources required to undertake it, will be most affected by the level of community engagement for which you plan. In each ICSP process element, there are a range of options for levels of community engagement. To help understand the range of possible engagement approaches in the rest of the guide, consider the following model for understanding different types of community engagement and the associated effort as presented in the table below (Victoria, 2005, as cited in Alimli et al., 2008)<sup>2</sup>. This guide uses the different types of engagement presented in this figure to categorize examples provided throughout the document.

In general, successful ICSPs, which become guiding documents for a community, are created by engaging members of the public in a variety of ways through each level of engagement as described below. The level and quality of the

		INTENSITY OF ENGAGEMENT				
		NUMBER ENGAGED				
		<b>INFORM</b> 	<b>CONSULT</b> 	<b>INVOLVE</b> 	<b>COLLABORATE</b> 	<b>EMPOWER</b> 
<b>EXAMPLES</b>		Poster with graphics	Appreciative inquiry	Visioning or backcasting workshop	Community leaders advisory groups	Community jury

engagement process is usually proportional to the sense of ownership by and support from the community, which are significant factors for successful implementation of the ICSP.

Community engagement is explained using five levels of engagement; inform, consult, involve, collaborate and empower (Head, 2007, as cited in Alimli et al.,

<sup>2</sup> Alimli, G., Imran, N., Ireg, M., and Nichols, J. (2008). Engaging Urban Communities of Newcomers to Sweden towards UNFCCC Climate Change Targets through Participation and Diversity. School of Engineering, Blekinge Institute of Technology, Karlskrona, Sweden. p 18.

# Integrated Community Sustainability Planning

## Phase II. Structuring the Process

2008)<sup>3</sup>. Through each level of engagement the number of people engaged decreases while the intensity of the engagement increases. Different tools and resources can be used to achieve the specific level of engagement. For example, a public open house held in the evening or during the weekend for a few hours would “inform” a large number of participants about the ICSP process, while a visioning or backcasting workshop would “involve” a smaller group of people for a longer period of time. In some cases, as we’ll see through examples provided in later sections of this guide, some municipal governments have “empowered” community groups to take the lead role in creating and overseeing the ICSP process, and others have engaged and empowered a diverse group of partners to contribute to the ICSP through their organisation’s actions. Subsequent sections will provide examples briefly describing the level of community engagement.

### Suggested Steps

Phase I – The Invitation	
Phase II - Structuring the Process	
Step:	Tools / Worksheets:
1. Identify a process leader and/or form a process leadership team.	
2. Begin to develop a common understanding and shared language around sustainability.	
3. Review the ICSP Guide and assess engagement options.	
4. Consult with municipal leadership.	<i>Key Questions to Answer to Structure the ICSP Process – p. 28</i>
5. Create a governance plan.	<i>Appendix 4:Composition of a Citizen Advisory Group</i>
6. Explore community engagement options for key ICSP deliverables.	
7. Decide on an approach for engaging the broader community.	
8. Finalize the structure of the planning process.	
Phase III – Community Visioning	
Phase IV – Understanding the Sustainability Gap for Key Community Systems	
Phase V – Identifying Strategies and Initiatives to Bridge the Gap	
Phase VI – Continuing the Journey and Monitoring Progress	

<sup>3</sup> Alimli, G., Imran, N., Ireg, M., and Nichols, J. (2008). Engaging Urban Communities of Newcomers to Sweden towards UNFCCC Climate Change Targets through Participation and Diversity. School of Engineering, Blekinge Institute of Technology, Karlskrona, Sweden. pp. 18

# Integrated Community Sustainability Planning

## *Phase II. Structuring the Process*

### 1. *Identify a process leader and/or form a process leadership team.*

Above all, the process leader or the members of the process leadership team must believe in the process that will be followed, and be committed to achieving a sustainable community. Ideally, the process leader has the ability to run meetings, resolve conflicts, bring people to the process and earn respect. He or she should also be very well versed in sustainability planning and The Natural Step Framework – if the person does not have those skills initially, then an investment in training and capacity-building for the process leader and/or the process leadership team is crucial. This person or team does not necessarily need to be an employee of the municipality or a councilor, although the process leader or process leadership team must have the endorsement of Council<sup>4</sup>.

### 2. *Begin to develop a common understanding and shared language around sustainability.*

Developing a common understanding around sustainability is very important if the ICSP process is going to gain traction in the community. It is particularly important because the term *sustainability* can mean many different things to many different people. While it may seem time-consuming and even unnecessary to some people, investing some time and energy early on to develop a shared understanding of the fundamentals of sustainability can help save you considerable time later in the process. Ultimately, it is necessary to develop a shared understanding of the fundamentals of sustainability and the societal transitions necessary to achieve it, and of the exciting possibilities that it presents for a community, to move from old behaviours, norms, values, assumptions and beliefs toward a new way of thinking.

Consider the following approach to achieve this desired outcome.

- Take some time to deepen your own personal comprehension of the core concepts of sustainability. The Natural Step has several online resources to help with this, including The Sustainability Primer ([www.thenaturalstep.org/en/canada/toolkits](http://www.thenaturalstep.org/en/canada/toolkits) ) and the Sustainability 101 eLearning Course ([www.thenaturalstep.org/elearning](http://www.thenaturalstep.org/elearning)).
- Create a shared understanding of sustainability within your process leadership team. A sustainability initiative will be more effective when everyone on the process leadership team shares the same basic understanding of sustainability and can become effective facilitators of the key concepts for other people in the process. Review some of the learning resources cited in the sidebar on Page 9.
- Begin to introduce some of the key concepts in your consultations with municipal leadership and other community stakeholders. Consider hosting optional “Sustainability Fundamentals” sessions for interested parties and/or making available the eLearning course “Sustainability 101.” Consider also
- inviting in guests from communities or businesses outside of your community who have some experience with sustainability and The Natural Step Framework to speak about how they benefitted by developing a shared language for sustainability.

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<sup>4</sup> For example, in Canmore, the municipality works closely with a locally based non-governmental association, the Biosphere Institute for the Bow Valley, on many of its sustainability initiatives. On the other hand, depending on the size and complexity of the planning process, a municipality may want to dedicate additional staff. For example, the City of Calgary has a staff of ten people dedicated to their *imagineCALGARY* long-term visioning exercise.

# Integrated Community Sustainability Planning

## Phase II. Structuring the Process

### 3. Review the ICSP guide and assess engagement options.

The process leadership team should review the various ICSP phases outlined in this guide and assess the financial and human resource requirements, timing and cost implications of the different engagement options in each phase. The aim is to gain an understanding of the implications of choosing certain options over another in order to facilitate decision-making in subsequent steps as more people are engaged in your community's ICSP process. The process leadership team may be able to make some immediate assessments about the suitability of certain approaches based on their understanding of the community. Ultimately, the process leadership team should be able to summarize their initial recommendations about the ICSP process for your community and identify the decisions that need to be made and input that is required to help make those decisions.

### 4. Consult with municipal leadership.

While there are instances where an ICSP may not actually be led by the municipal government (rather by community groups), it is nevertheless always important that the municipality be involved. In any case, it is important early in the process to engage in conversation with municipal leadership (i.e. senior staff, CAO, Mayor and Council) around sustainability, leadership, the value of a framework and what other communities are doing and then narrow in on a desirable process and next steps to support the development of the community's ICSP. This may take place over one or more meetings, information sessions and/or briefing sessions.

The desired outcome of these sessions is to:

- Continue to build awareness around sustainability and community sustainability planning and begin to build a common language and deeper understanding of sustainability (see step #2 on p. 27).

### Key Questions to Answer to Structure the ICSP Process

- i. What is the desired form of governance for the overall ICSP process? Is there an interest in forming a Citizens Advisory Group, for example (see step #5 below p. 29)?
- ii. Can we adapt an existing community vision to incorporate sustainability or is there a need for a new vision? How will we create the vision (see "Community Visioning" p. 32)?
- iii. What are the most important community systems to address for a sustainable community? How many systems should be addressed and which ones (see "Understanding the Sustainability Gap for Key Community Systems" p. 39)?
- iv. What is the desired approach for engaging the community to help determine the sustainability gap in each key community system and for identifying strategies and actions to bridge the gap (see "Understanding the Sustainability Gap for Key Community Systems" p. 39 and "Identifying Strategies and Initiatives to Bridge the Gap" p. 48).
- v. What is the desired approach for engaging the community stakeholders in key elements of the process and is there interest in establishing partnerships with community stakeholders around the development and/or implementation of the ICSP? What will be the expectations and roles of community partners (see step #6 below p.30)?
- vi. What is the desired approach for engaging the broader community in the process (see step #7 below p.31)?
- vii. What is the desired approach for monitoring and reporting on ICSP implementation when the plan is complete (see "Continuing the Journey and Monitoring Progress" p. 52)?

# Integrated Community Sustainability Planning

## *Phase II. Structuring the Process*

- Receive direction on the questions in the sidebar on page 28, which will help the community make the key decisions necessary to structure the ICSP process.
- Identify potential funding sources and secure the necessary financial and human resources commitment to get the process started at least.
- Receive approval (and ideally the allocation of necessary resources) for a desired planning process (see step #8 on p. 31).

### 5. *Create a governance plan.*

It is important that roles and responsibilities for various elements of the ICSP process be made clear at the beginning. The purpose of designing a governance plan for the ICSP process is to determine who will play different roles and make key decisions during the design and development of the community's ICSP. Clear guidelines for accountability are important to empower both staff and community stakeholders in the process of developing and implementing the ICSP.

Many different governance models are possible and may be appropriate for an ICSP – from partnership models with significant community partners to citizen-led processes. There is no substitute, however, for the leadership of democratically elected Council, and ultimately major decisions should be made by Council – particularly in the early stages and as they relate to municipal government resources.

Council may, however, choose to form a Citizens Advisory Group (CAG) as a way to involve citizens directly and to leverage the influence and resources of other organizations in the community, e.g. a school, economic development authority or local arts organization. A CAG is ideally a group of citizens who are leaders in the community and who agree to provide advice and guidance for the ICSP process, particularly as it relates to community engagement. See *Appendix 4* for more on the composition of a CAG.

Council might consider forming a CAG for the following reasons:

- **Resources for Implementation:** Later on in the process, once the plan is written and the community moves into the implementation stage, CAG members can play an important role to help implement certain initiatives and investments. Involving stakeholders from the onset ensures that they will be on board when it comes time to implement the plan. For example, if someone from the local school board is involved at the onset, then they may propose and lead a community sustainability educational program. In this sense, the members of the CAG are key to supporting the implementation of the plan in addition to writing it.
- **Expertise and Networks:** There is a wealth of knowledge in each community and the CAG allows the community to take advantage of this expertise. In addition, CAG members will also have access to networks of people, likely from outside the community, who can bring resources to the initiative. For example, a community group may have experience in writing proposals for sustainability initiatives, or be aware of funding agencies that could provide resources to the initiatives.

*“To capture the energy and commitment of employees and stakeholders, a governance system must be crafted that meaningfully involves them in planning and problem-solving and equitably shares the fruits of success.”*

**-Bob Doppelt, Leading Change Toward Sustainability**

# Integrated Community Sustainability Planning

## *Phase II. Structuring the Process*

- **“Pulse” of the Community:** The CAG can be thought of as a resource to gauge how the community feels on issues, for example by having the CAG review key documents before they are released to the public at large. This will save time and hassle if sensitive issues can be identified and addressed before releasing documents too broadly. In addition, the CAG can also help garner the support of different sectors. For example, if a well respected business leader is involved, then this person can be used to bring on support of the business community.

The CAG is a resource throughout the process, and can be particularly useful during three parts of the planning process:

- Synthesizing community input on a vision (see “Community Visioning” p.32);
- Identifying which community systems to address in order to achieve the community’s vision and sustainability (see “Understanding the Sustainability Gap for Key Community Systems” p. 39);
- and either:
  - determining the sustainability gap for key community systems as well as strategies and actions to bridge the gap; **or**
  - Identifying key stakeholder organizations to engage with in order to help determine the sustainability gap for key community systems as well as strategies and actions to bridge the gap (see “Understanding the Sustainability Gap for Key Community Systems” p. 39 and “Identifying Strategies and Actions to Bridge the Gap” p. 47).

Although many communities have used a CAG to provide guidance in the planning process, not all communities may want to use a Citizens Advisory Group. If a CAG is not formed, then the process leadership team will have to ensure that the roles described above are filled by some other group or groups. Alternatives to a CAG may include: Council simply playing this role (if they are a very active and engaged Council); Council designating some other trusted community group or committee to play this role<sup>5</sup>; working with existing municipal advisory committees to obtain advice on specific items at various point in the ICSP process<sup>6</sup>; etc.

### *6. Explore community engagement options for key ICSP process deliverables.*

While the level of community engagement in the ICSP process overall is often a key determinant of buy-in within the community, the chosen approach to engagement for certain key deliverables are particularly important in determining the scope of the ICSP planning process. It will be important to engage key stakeholders in the ICSP (e.g. Council, Citizens Advisory Group, etc...) in the decisions about levels of community engagement for the following deliverables in particular:

- Developing the vision of the community in a sustainable future (see “Community Visioning”, p.32).

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<sup>5</sup> For example, in Olds, AB, the Town of Olds designated its trusted community partner, the Olds Institute, itself an association of leading community organizations, to lead the development of the ICSP.

<sup>6</sup> For example, for its “Imagine our Future” program, the City of Williams Lake, BC, chose not to form a Citizens Advisory Group and instead for Council to play much of the role described for a CAG. It also decided to use the existing citizen-led municipal advisory committees to develop and refine its descriptions of success and current reality in various community systems (strategy areas).

# Integrated Community Sustainability Planning

## Phase II. Structuring the Process

- Determining the sustainability gap for each community system and identifying strategies and actions to bridge the gap (see “Understanding the Sustainability Gap for Key Community Systems” p. 39 and “Identifying Strategies and Actions to Bridge the Gap” p. 47).
- Forming partnerships with community stakeholders to support implementation of the plan (see “Continuing the Journey and Monitoring Progress” p. 52).

Depending on community readiness, it may be too early in the process at this stage to consider deciding on engagement approaches and formalizing partnerships among community stakeholders for the ICSP (although in some cases such partnerships **have** been formed very early on in the process). While the final decisions about desired approaches for certain deliverables can potentially be made later in the process, they will have implications on the required resources for the ICSP process. So, it is likely that Council, funders and other stakeholders will want to have as much detail about the approach to the development of each deliverable as possible early on. This will make finalizing the process structure and allocating the necessary resources easier.

### 7. *Decide on an approach for engaging the broader community throughout the process.*

While specific deliverables in the ICSP process will involve community members as outlined above, it is also important to continuously engage with the broader community at large. This involves communicating with the community about events and milestones in the ICSP process and also opportunities for community members to get involved. This may take the form of newsletters, regular community forums, a booth at community events, an interactive web site, etc... Most communities have existing means of communication with the public and some experience about what works in their community. In structuring the ICSP process, a decision should be made about the best way to communicate with the broader community about sustainability and the ICSP. Keep in mind that **communication is a two-way street** – there should be opportunities for community members to raise questions, provide feedback and share insights in addition to hearing about the ICSP process.

#### Hints & Tips

Local media can be an important partner in your ICSP process. Don't forget to inform them early and often about the process. You may even consider inviting local media organizations to be “Early Adopters” themselves (see sidebar, p. 18).

### 8. *Finalize the structure of the desired planning process.*

Like any good planning process, the approach to your community's ICSP can and should always be adapted as you go through the various phases and learn about what works in your community and what doesn't, and as new ideas and opportunities emerge. However, to get the process started a final process plan indicating the approach that the community will take to achieve the various ICSP phases should be approved by Council and shared with all stakeholders. The process plan should clearly lay out process, desired outcomes, time commitments, roles and responsibilities and cost implications. The process leadership team can work to ensure that the process plan reflects both the backcasting from sustainability principles approach as contained in this guide and the preferences of the community as they relate to levels and styles of community engagement.

# Integrated Community Sustainability Planning

## Phase III. Community Visioning

*"Compelling visions are felt in the heart and understood in the mind."*

**- Bob Doppelt, Author of Leading Change Toward Sustainability**

Being strategic requires having a clear understanding of success, of where one wants to be. This is the essence of backcasting. Many communities use the concept of a “vision statement” to define success at the highest level. The primary purpose of a community vision is to unite the community around a shared statement of purpose and core values. It should be future focused and act as a functional benchmark providing direction for all aspects of the community into the future.

Having a strong shared vision of what a community wants is absolutely critical. However, simply developing a well-articulated vision statement is not enough. The most successful efforts build a shared sense of purpose, commitment and intent. So, think about the visioning element of your community’s ICSP as an opportunity to begin the process of building a shared intention in the community to achieve a sustainable future.

Building shared intention through community visioning requires a process that both helps community members articulate their aspirations for the future **and** helps develop a deeper understanding within the community of what is required for a sustainable future. While this section focuses primarily on the high-level vision, there is a strong connection between the high-level vision and the descriptions of success for each key community system described in *Phase IV* on “Understanding the Sustainability Gap for Key Community Systems” p. 39, which provide a more robust expression of the desired future. Together, these two key deliverables help build a clearer sense within the community of where it wants to and needs to be in a sustainable future.

### Desired Outcome

- A shared understanding of success for the community in a sustainable future and a shared intention to create that future has been developed amongst community members.

### Suggested Steps

Phase I – The Invitation	
Phase II - Structuring the Process	
Phase III – Community Visioning	
Step:	Tools / Worksheets:
1. Use or adopt sustainability principles.	<p><i>Appendix 5: How Various Sustainable Communities Principles and Approaches Relate</i></p> <p><i>Appendix 6: Sample Council Resolution</i></p> <p><i>Appendix 7: Example of a Sustainability Declaration</i></p>



# Integrated Community Sustainability Planning

## Phase III. Community Visioning

2. Decide on scope of visioning process.	<i>Appendix 8: imagineCALGARY Visioning Process</i> <i>Appendix 9: Canmore's Visioning Process</i>
3. Gather community input on the vision.	<i>Appendix 10: Writing Vision Statements</i> <i>Appendix 11: Sample Vision Statements</i>
4. Synthesize input into a vision statement.	
5. Communicate and celebrate the vision.	
Phase IV – Understanding the Sustainability Gap for Key Community Systems	
Phase V – Identifying Strategies and Initiatives to Bridge the Gap	
Phase VI – Continuing the Journey and Monitoring Progress	




### 1. Use or adopt sustainability principles.

When it comes to sustainable community planning, it is not enough to identify an attractive and pleasant community vision. The envisioned future must also be sustainable. One way that a growing number of communities have ensured that their visions are sustainable is to utilize the rigorous, science-based definition of sustainability provided by the sustainability principles of The Natural Step Framework as the overarching guiding principles for the community's sustainability change process and the frame for its vision.


While your community's sustainability initiatives gain momentum and more people become involved, the need to establish a strong definition and understanding of sustainability becomes more and more important. These principles are the result of over 20 years of scientific research and academic scrutiny to define sustainability and are designed to be used for backcasting.

SYSTEM CONDITIONS FOR SUSTAINABILITY

In a sustainable society, nature is not subject to systematically increasing...

- 
...concentrations of substances extracted from the earth's crust,
- 
...concentrations of substances produced by society,
- 
...degradation by physical means,

and, in that society...

- 
...people are not subject to conditions that systematically undermine their capacity to meet their needs.

# Integrated Community Sustainability Planning

## Phase III. Community Visioning

Since these principles are very precise and scientific in their language, due to their academic roots, they can be difficult to grasp initially and may be met with some scepticism or resistance. The experience of communities using these principles is that this can be overcome through education; most people find that the principles are actually fairly simple to grasp with a little bit of time spent understanding the science that underpins them and when given examples of their application. Therefore, it is recommended that the introduction of these principles be accompanied with an educational component such as a workshop. For example, the Town of Canmore held a series of workshops and an “Early Adopters” program, like the one described on page 18, to introduce the principles to local businesses, elected officials and municipal staff to help build familiarity, and explore how the principles apply to their community.

Council may choose to formally adopt the sustainability principles to simply use them for guiding planning and decision making. If Council chooses to formally adopt the principles, it may adopt them as guiding principles or it may choose to embed them within an official statement about the community’s commitment to sustainability, such as a Sustainability Declaration or a Sustainability Policy. For an example of a Council resolution to adopt these principles as guiding principles see *Appendix 6: Sample Council Resolution*, and for an example of a Sustainability Declaration, see *Appendix 7*.

**It is important to note that while the sustainability principles represent long-term conditions that must be met for society to be sustainable, they should not be confused with a vision. Rather, the principles help communities ask good questions about their vision to ensure that they are moving towards a future where the conditions of sustainability are met.**

Among other areas, the principles will be most useful in the following ICSP phases:

- They will help frame your community vision so that it describes both a desirable **and** sustainable future (see “Picture this!” sidebar on p. 35).
- They will ensure that the Descriptions of Success for the key community systems also describe a future state for that system that is sustainable (see “Understanding the Sustainability Gap for Key Community Systems” p. 39).

### How Various Sustainable Communities Principles Relate

There are other sets of principles for sustainable communities, such as the Melbourne Principles ([http://www.iclei.org/fileadmin/user\\_upload/documents/ANZ/WhatWeDo/TBL/Melbourne\\_Principles.pdf](http://www.iclei.org/fileadmin/user_upload/documents/ANZ/WhatWeDo/TBL/Melbourne_Principles.pdf)) used by some communities. The sustainability principles used in The Natural Step Framework can be used in conjunction with these other sets of principles since they are first-order principles that describe the conditions for a sustainable society overall. As such, they provide an overarching structure that can encompass all other, more process-oriented principles. For example, the Melbourne Principles provide a set of statements on how a sustainable community would function and offer excellent principles to support a community’s journey towards sustainability, while the sustainability principles of The Natural Step Framework define the end state conditions that must be met for a community to be sustainable and provide guidance for planning and decision making towards sustainability. For more detail on how various principles, tools and approaches for sustainable community development relate to one another, see *Appendix 5*.

# Integrated Community Sustainability Planning

## Phase III. Community Visioning

- They will ensure that prioritization efforts factor in the extent to which potential strategies and actions move the community toward alignment with sustainability (see “Identifying Strategies and Initiatives to Bridge the Gap” p. 47).
- They will help ensure that all community partners in the ICSP share a commitment to a common set of sustainability principles based on a shared understanding of what sustainability means (see “Continuing the Journey and Monitoring Progress” p. 52).

While many communities choose to formally adopt the principles or the sustainability declaration early in the process (e.g. along with the Council commitment to the ICSP process), the timing of the formal adoption of the sustainability principles can vary depending on community readiness and the levels of awareness and buy-in within the community. For example, some communities may wait to formally adopt the sustainability principles until after the visioning process or later. In general though, the earlier the commitment to using the principles can be made, the more logical it will be for participants to use them in guiding decision-making and priority setting during other ICSP phases.

### 2. *Decide on the scope of the visioning process.*

The prospect of embarking on a community visioning process may seem daunting for some. It is important to scope the visioning process within the resource constraints of the municipality. Fortunately, it is entirely feasible to do so. While the next sections describe the steps in a full visioning process, different approaches and level of engagement are possible in this process element. For example, many communities have some experience with visioning processes already. Some may even have an existing vision statement for the community – developed in the past outside of the process of an ICSP. Those who already have a community vision may, rather than developing a whole new vision, choose to limit the scope of this ICSP element to adopting the sustainability principles and reviewing the current vision to ensure its relevance from the perspective of sustainability. Even those communities without an existing vision statement, and who wish not to undertake the development of a vision at this time, could, as an alternative, simply adopt the sustainability principles and backcast directly from the principles, saving a broader visioning process for some point in the future. This would still provide sufficient guidance for the community towards a future where the conditions of sustainability are met.

### Picture this!

Think of the four sustainability principles as the four sides of a picture frame. They provide very clear boundaries for the canvas inside, but it's up to you to create the painting; the picture of your community operating sustainably. The principles are descriptive, not prescriptive, so they free you up to design actions that fit your unique situation. In your community visioning process, encourage participants to unleash their inner artists and be creative. Let potential actions spring up: new energy systems, resource efficiency improvements, substitutions of certain materials or new and more service-oriented and resource-efficient business models. There is no one right way to paint the picture of success.



# Integrated Community Sustainability Planning

## Phase III. Community Visioning

For those communities that do decide to undertake a visioning process as part of their ICSP, there is no one way to develop a community vision and varying degrees of community engagement are possible. For example, Council might choose to develop the vision themselves and/or with the input of a Citizens Advisory Group, then hold a public meeting or other means to gather community input, and then have Council formally adopt the vision.

A common element of the most successful visioning processes, however, is that as many community members as possible are invited to contribute to the shaping of the vision. This, in turn, enhances buy-in and ownership.

### 3. Gather community input on the vision.

A vision essentially represents a community's hopes and dreams for its future, which are generally more motivating for people than any statements of principle. And there are many different ways to gather the community's perspectives on their aspirations for the future of the community. Typically however, they employ a form of appreciative inquiry (see Hints & Tips text box for more on this) and, for example, ask the community for its perspectives on the following:

- the *values* of the community
- what they would like to *change*\*
- what *characteristics* they would ultimately like to see in their community\*
- what *assets* the community has to support that change\*
- what they can do to *help*

*\*Don't forget to encourage participants to consider the **social, cultural, environmental, economic and governance dimensions** of the community in their feedback.*

When gathering input it is useful to keep in mind that different people will want to be involved in different ways. There are three main levels of engagement to keep in mind:

- i. First, there are the people in the community who are the most keen to be involved in a visioning process and will be willing to spend a lot of time in helping gather input, providing their own input and helping to synthesize input from others into a vision statement. These are people that may already be part of a Citizens Advisory Group. For people with this level of energy, it is useful to engage them in deep dialogues on where they see the community going. For example, consider inviting them onto a Citizens Advisory Group or creating a special advisory group on the visioning process specifically.

### Hints & Tips

Appreciative Inquiry is the cooperative search for the best in people, their organizations, and the world around them. It involves systematic discovery of what gives a system 'life' when it is most effective and capable in economic, ecological, and human terms. It involves the art and practice of asking questions that strengthen a system's capacity to heighten positive potential. It mobilizes inquiry through crafting an 'unconditional positive question' often involving hundreds or sometimes thousands of people. Cooperrider, D.L. & Whitney, D., "Appreciative Inquiry: A positive revolution in change." In P. Holman & T. Devane (eds.), *The Change Handbook*, Berrett-Koehler Publishers, Inc., pages 245-263.

# Integrated Community Sustainability Planning

## Phase III. Community Visioning

- ii. Secondly, there are people in the community who are interested in discussing the future of their community; however, they are not willing or able to commit great amounts of time. For example, these people may come out to an evening event for an hour to give their input, however, this will likely be their total commitment. For these people, it is useful to consider other ways to engage them. For example, consider designing one or two hour evening workshops or dialogues that these people can attend to provide input, or having “neighbourhood cafes” that are facilitated dialogues asking relevant questions about the future of their community.
- iii. Thirdly, there are people in the community who only have a passing interest in the visioning process, and will likely not proactively involve themselves. For these people, it is useful to come up with quick ways to gather their input. For example, these can consist of a survey on a website or a street survey where people on the street are asked a select number of questions. One very effective way of reaching these individuals is to go to the community events and venues where they will be (e.g. hockey arenas, farmers markets, etc.) and set up a booth where their feedback can be briefly gathered.

It is useful in advance to consider ways to involve the above three types of people into the process. There is no shortage of innovative ways to engage people in the dialogue. For some examples, see the case studies in *Appendix 8 and 9* that describe the visioning processes in the City of Calgary and the Town of Canmore.

#### 4. Synthesize input into a vision statement.

Once input from the community has been gathered, there will need to be a step where the information is synthesized into a vision statement. There is no obvious way to do this, and it will involve drafts and revisions. It will likely require the process leadership team to do a first round of synthesis that will then be given to Council and citizens or the CAG for review and to Council for approval. For those communities that have gathered input on alternative scenarios (see sidebar on this page about scenarios), this step may instead involve synthesizing input into a preferred scenario. This would likely involve a similar synthesis process.

While the vision may take many forms and should be unique to the community, the following elements are recommended for inclusion in a vision statement:

### Hints & Tips - Scenarios

Many communities have used alternative scenarios of the future to help community members think about the future of their community. Scenarios can be very effective in helping community members understand the implications and trade-offs of different ways forward. They can also be used to focus input during later stages of visioning. MetroQuest (<http://www.metroquest.com>) is one common tool used in Canadian communities to support scenario development. It is profiled in *Appendix 8* about the imagineCALGARY process. If your community decides to use scenarios, it is important that all future scenarios are also scrutinized and assessed through the lens of the sustainability principles – i.e. how well does this scenario take us toward alignment with our sustainability principles?

# Integrated Community Sustainability Planning

## Phase III. Community Visioning

- *High-level Vision Statement* - This is, in effect, a very broad all encompassing statement of what the community is all about. It should be inspiring or challenging and seen as worthwhile. It also needs to be capable of being clearly articulated in very few words and sufficiently tangible and quantifiable.
- *Statement of Core Values* - A community's core values are akin to its personality—not just what it does, but what it is and what it values as being important. The core values, therefore, essentially represent the community's culture.
- *Sustainability Principles* - Based on scientific consensus these define “sustainability” at the most fundamental levels, and form the scientific foundation for the vision. The sustainability principles therefore, guide decision making and provide direction for a sustainable community future.

The vision statement should also be scrutinized through the lens of the sustainability principles by asking whether the vision will lead to a community where these principles are still violated. There may need to be an educational component on these principles for those working on synthesizing the community's input into a vision statement. See *Appendix 9* for how the Town of Canmore reviewed its vision using the sustainability principles. See *Appendix 10: Writing Vision Statements* for further guidance on drafting a vision statement and *Appendix 11: Sample Vision Statements* for sample vision statements.

### 5. *Communicate and celebrate the vision.*

Once the vision is finalized, organize an event to celebrate the vision with the community. If Council has decided to form a CAG, its members should play a prominent role in such an event to help create buy-in into the vision. The project team, municipality, and CAG should also consider other ideas for communicating the vision with the public.

Never underestimate the power of a “sense of community”, i.e. the relationships that create the foundation for community trust and happiness. The most brilliant sustainability plan will fail if the community is not behind it or is too fragmented to collaborate in its implementation. Simple activities - such as concerts or pancake breakfasts – can go a long way in building a sense of community. If the municipality is resource-constrained, the celebration of the vision could be piggy-backed onto an annual community event.

### Case Study

As part of its municipal sustainability planning process, the **City of Airdrie, Alberta** created a community-wide engagement process to develop a shared vision of the future that all community members can work toward. Named EnVision Airdrie, the visioning process created momentum that led to immediate action.

When the Canadian Broadcasting Corporation's The Hour launched One Million Acts of Green, an initiative encouraging Canadians to complete as many sustainable actions as possible, Airdrie's citizens jumped at the chance. By the end of the project, 739 people had registered online for the project, adding more than 33,000 'acts of green' which, if implemented, will prevent a total of almost 3,350,000 kg of greenhouse gases from being released into the environment.

EnVision Airdrie helped the community rally together to create change. In the meantime, the municipality is also leading the development of an integrated community sustainability plan and an internal program to guide municipal-level decision making and actions toward sustainability.

For more, visit

<http://www.thenaturalstep.org/en/city-airdrie-alberta>.

# Integrated Community Sustainability Planning

## Phase IV. Understanding the Sustainability Gap for Key Community Systems

*"Leadership in a learning organization starts with the principle of creative tension. Creative tension comes from seeing clearly where we want to be, our 'vision,' and telling the truth about where we are, our 'current reality.' The gap between the two generates a natural tension."*

- Peter Senge, Author

Sustainability isn't just about how far a community has come or even where it is heading. A community needs to understand the gap between where it is today and where it wants to be in a successful, sustainable future. The tension established by this "sustainability gap" is fundamental to the creativity and innovation necessary to find new ways forward.

This part of the process involves identifying community systems that must be addressed to achieve the vision and developing "descriptions of success" (i.e. how that system would look like if the vision was achieved) and "descriptions of current reality" (i.e. how that system looks today). Using the sustainability principles to frame both steps helps ensure that the description of success falls within the constraints of a sustainable future and that the assessment of current reality is rigorous and complete. Together these help us understand the sustainability gap.

### Thinking in Systems

There are a number of ways to understand and conceptualize community. In terms of sustainable community planning, however, it is helpful to conceptualize the community from the perspective of a diversity of interdependent systems. For example, a community is a system itself and is made of a variety of other systems - an energy system, a food system, a recreation and leisure system, etc.

Even if we don't always think of some of these as systems and often don't organize our communities around such systems, we can intuitively understand that they exist regardless - the community's food system is the complex set of relationships and processes that together form the way that the community feeds itself; its energy system is the way that various organizations, infrastructure, and people combine to meet the community's energy needs, etc... Even for those systems that we don't as easily conceptualize as systems (e.g. recreation and leisure, arts and culture), it is helpful to view them as systems as well.

Although some of these systems relate to traditional functional areas in a municipal government, taking a systems approach means considering all aspects of the system beyond that for which the municipality has direct responsibility. For example, a municipality has direct responsibility over only certain aspects of the community's transportation system such as road layout, design and maintenance, and possibly also the community's transit system where responsibility is more at arm's length. However, a community's transportation system as a whole comprises many other aspects and stakeholders both within and outside the community.

Taking a systems perspective allows people to see the whole system and the interrelationships amongst the parts of that system, rather than focusing on its individual parts. This means addressing issues in an integrated way rather than on a one-by-one basis. By viewing things from a systems perspective we can consider social, cultural, economic and environmental dimensions as an integrated whole and identify opportunities to foster untraditional collaboration amongst various community stakeholders.

# Integrated Community Sustainability Planning


## Phase IV. Understanding the Sustainability Gap for Key Community Systems

One of the **key challenges of this step is how to ensure both comprehensiveness and integration.** A comprehensive approach to sustainable community planning requires that all aspects of a community be considered. An integrated approach to sustainable community planning requires that these various aspects not be considered in isolation from each other. The **key to achieving both comprehensiveness and integration is to use the same framework and process for the review of all community systems and to identify strategies that synergistically support transitions in different community systems.** This **cross-system fertilization can be explicitly designed** into an engagement process.

### Desired Outcomes

- A determination has been made about which key community systems (e.g. energy, food, etc...) need to be addressed in order to achieve sustainability and the community's vision.
- A shared understanding of the gap between current reality and a successful, sustainable future has been established for the key community systems.
- Indicators have been identified that can be used to monitor progress towards success for each key community system.

### Suggested Steps

Phase I – The Invitation	
Phase II - Structuring the Process	
Phase III – Community Visioning 	
Phase IV – Understanding the Sustainability Gap for Key Community Systems	
Step:	Tools / Worksheets:
1. Determine the key community systems.	<i>Appendix 12: Facilitator's Notes to Identify Community Systems</i> <i>Table p. 42: Potential Community Systems</i>
2. Determine a preferred engagement approach for analyzing the sustainability gap for the key community systems.	<i>Appendix 13: Tips on Engaging Task Forces</i>
3. Build the capacity of participants to analyze the sustainability gap.	<i>Appendix 14: Lessons Learned on Participant Engagement</i>
4. Develop Descriptions of Success for each key community system.	<i>Appendix 15: How to Develop a Description of Success</i> <i>Appendix 16: Lessons on Descriptions of Success.</i> <i>Appendix 17: Example Description of Success – Williams Lake, B.C.</i> <i>Appendix 18: Example Description of Success – Whistler, B.C.</i>



# Integrated Community Sustainability Planning

## Phase IV. Understanding the Sustainability Gap for Key Community Systems

5. Develop Descriptions of Current Reality for each key community system.	<p><i>Appendix 19: How to Develop a Description of Current Reality.</i></p> <p><i>Appendix 20: Guiding Questions for the Four Sustainability Principles</i></p> <p><i>Appendix 21: Guiding Questions for Assets Inventory</i></p> <p><i>Appendix 22: Lessons on Descriptions of Current Reality</i></p> <p><i>Appendix 23: Example Description of Current Reality – Williams Lake, B.C.</i></p>
6. Select performance indicators and targets.	<p><i>Appendix 24: How to Select Performance Indicators and Targets</i></p> <p><i>Whistler 2020 Monitoring Program: <a href="http://www.whistler2020.ca">http://www.whistler2020.ca</a></i></p>
Phase V – Identifying Strategies and Initiatives to Bridge the Gap	
Phase VI – Continuing the Journey and Monitoring Progress	

### 1. Determine the key community systems.

The first step is to determine which community systems need to be addressed in order to achieve sustainability and the community’s vision. The determination of which community systems to address will be specific to each community, depending on local issues, needs, assets, resources, values, and on the community’s vision. It will also likely be an iterative process, in that new community systems or new grouping for community systems may emerge as the work progresses.

The process leadership team should consider engaging Council and/or the CAG in making the determination of which community systems are most relevant to explore. You might also want to consider engaging key community stakeholders and/or the broader community in this determination. A sample agenda of a meeting to do this is provided in *Appendix 12: Facilitator’s Notes to Identify Community Systems*.

A list of 12 potential community systems is provided in the table on page 42. Although the list provided is intended to cover all aspects of community, these are just suggestions, and they can be regrouped and/or additional community systems may be identified. The benefit of not grouping them, i.e. keeping them more precise and distinct, is that it gives a clearer scope for discussion and analysis. In any case, there is no single best way to do this and the approach is flexible - the final decision on key community systems is up to each community.

### Hints & Tips

It is tempting to structure your ICSP around the so-called “dimensions” or “pillars” of a sustainable community – e.g. social, cultural, economic, environmental, governance. We strongly advise against organizing yourself in this way and rather encourage thinking in terms of community systems. Each of the community systems mentioned here has implications for and connections to the social, environmental, cultural and economic dimensions of the community. An integrated approach will address all of those dimensions within each key community system, rather than structuring the process around the dimensions.

Ideally all or most of these systems should be addressed. However, recognizing the reality that resources are limited, the CAG and Council can help select the most relevant and pressing for the community.

# Integrated Community Sustainability Planning

## Phase IV. Understanding the Sustainability Gap for Key Community Systems

### Potential Community Systems

Community System	Description
Arts/Culture/ Heritage	How arts, culture and heritage will be supported, enhanced and delivered, and how they will stimulate and support the transition to sustainability in your community.
Built Environment	How to develop and renew buildings, neighbourhoods and facilities that will contribute to making your community unique, live-able, affordable and sustainable.
Economic Development	How to create a strong local economy and develop and maintain successful, resilient businesses that help move the community toward sustainability.
Energy	How to meet your community's energy needs in an efficient, affordable, sustainable and reliable way, while managing greenhouse gas emissions and air quality.
Food	How to ensure a healthy, nutritious and sustainable food supply that maximizes opportunities to build the social, ecological, cultural and economic capital of the community.
Health and Social Services	How to meet the health and social needs (including physical, mental, spiritual and emotional) of the community.
Learning	How to meet community needs for formal and informal lifelong learning.
Materials and Solid Waste	How to meet your community's need for material supply and disposal through the most efficient use and reuse of the most sustainable materials and keeping waste out of the natural environment.
Natural Areas	How ecosystem integrity and biodiversity will be protected and where possible restored in your community/region.
Recreation & Leisure	How recreation and leisure activities for both residents and visitors will be delivered to exceed expectations while protecting the environment.
Transportation	How to move people, goods and materials to, from and within the community in a more sustainable manner.
Water	How to provide a dependable supply of high quality water in a way that maintains healthy aquatic environments and uses water efficiently.

# Integrated Community Sustainability Planning

## Phase IV. Understanding the Sustainability Gap for Key Community Systems

### 2. Determine a preferred engagement approach for analyzing the sustainability gap for the key community systems.

Involving local community stakeholders in determining the sustainability gap for different community systems ensures that the plan responds to the needs, concerns and preferences of local citizens and benefits from the knowledge and resources of local residents and institutions. There is, however, no one way of involving community stakeholders in this process and each community must decide an approach that is appropriate for them.

The following table highlights four alternative approaches to establishing the sustainability gap using the engagement types first introduced on page 25. A hybrid of these approaches may be most appropriate for your community.

Engagement Type	Description	Example
 Consult	The <b>process leadership team</b> can determine the gap for key community systems themselves (or ask <b>consultants</b> to do so) and then <b>invite</b> key community <b>stakeholders</b> and/or the community at large to provide <b>feedback on the findings</b> .	In the <b>National Capital Region's</b> "Choosing our Future" project, consultants developed draft "long-term goals" and baseline analyses for 12 key community strategy areas. In an initial phase of engagement, these analyses are being refined through feedback from a wide range of consultations, with municipal government officials, partner organizations, and the general public. Deeper engagement is also planned for later phases. For more information, visit: <a href="http://www.choosingourfuture.ca">http://www.choosingourfuture.ca</a> .
 Involve	The initial work on the sustainability gap for various community systems can be drafted by the <b>Citizens Advisory Group</b> , and then <b>specific community groups</b> (e.g. existing municipal advisory groups and/or relevant community organizations) can be <b>invited to review and complete the descriptions of success and current reality that are most relevant to them</b> .	In <b>Williams Lake, B.C.'s</b> "Imagine our Future" project, the City's existing municipal advisory committees were invited to identify which of the 10 strategy areas they would like to review, and then the ICSP process leaders attended meetings of those committees to gather input on draft descriptions of success and current reality. For more information, visit: <a href="http://www.imagineourfuture.ca">http://www.imagineourfuture.ca</a> .
 Collaborate	Key community <b>stakeholders and/or the community at large</b> can be <b>engaged in workshops</b> to determine the sustainability gap for each community system and to synthesize the input from various community members.	In <b>Olds, Alberta</b> community members were invited to 1-day workshops based on age. In each session, participants were asked to analyze the current reality of 15 community systems, define success, and suggest opportunities to bridge the gap between the current reality and success. The CAG then integrated all of the input into a single plan. For more on the Town of Olds, visit: <a href="http://www.olds.ca/sustain.html">http://www.olds.ca/sustain.html</a> .
 Empower	The community can form <b>new task forces</b> of interested and relevant stakeholders around key community systems and have the task forces <b>determine the sustainability gap for each community system</b> . <i>Appendix 13</i> provides helpful insight into the benefits of using task forces and on their composition.	In <b>Whistler, B.C.</b> community task forces were formed for each of 16 strategy areas. Over a series of 5 meetings, task forces developed the statements of current reality, descriptions of success for their strategy area. Task forces also meet annually to prioritize actions and assign them to the relevant community partners, many of whom are members of the task forces. For more information, visit: <a href="http://www.whistler2020.ca">http://www.whistler2020.ca</a> .

# Integrated Community Sustainability Planning

## Phase IV. Understanding the Sustainability Gap for Key Community Systems

### 3. Build capacity of participants to analyze the sustainability gap.

Whoever is undertaking the task of determining the sustainability gap (i.e. process leadership team, CAG, existing municipal advisory members, task force members, etc.) should commit to participating fully in a process to develop the necessary deliverables, respecting both the importance of this work and the time constraints of members. They should be clear on the time commitment, both during and outside meetings (e.g. pre-reading), and the deliverables required for the ICSP, which should include:

- A “description of success” for the community system aligned with the community’s vision and with sustainability principles;
- A “description of the current reality” of the community system;
- A set of proposed indicators to measure progress towards success for the community system;

To achieve these deliverables and to work effectively as a group, participants should ideally have both a solid foundation in the backcasting process and a clear understanding of where their work fits into the broader community planning process. As much time as possible – whether it is 10 minutes, a half-day orientation session, or a 2-day training workshop - should be invested at the outset to ensure that participants have a shared understanding of the community’s vision, the planning process as a whole, the sustainability principles, and the process of backcasting. For example, the first session with each group may simply be to have a discussion on the community’s vision, train people on backcasting, practice identifying the sustainability gap for a particular community system, and to clarify the process they will go through together. Having all participants take one of the eLearning courses *Sustainability 101* or *Sustainability: Step by Natural Step* is also a good resource-efficient way to expose them to some of the key concepts.

Please see [Appendix 14](#) for lessons on participant engagement. These lessons are relevant to review when considering how to engage the task force members.

### 4. Develop Descriptions of Success for each key community system.

The Description of Success (DoS) should describe what success in this community system will look like in the sustainable future described by the community vision and framed by the sustainability principles. It generally takes the form of a statement of the highest aspirations and purpose for the community system combined with a number of long-term strategic objectives that provide further detail. It also answers the question, “What would the characteristics of our community’s {energy, food, transportation, etc...} system be if it were fully aligned with the four sustainability principles?”

Suggestions for a process to develop a Description of Success are provided in *Appendix 15: How to Develop a Description of Success*.

#### Hints & Tips

Depending on your particular community system, you may choose to start with an analysis of Current Reality before you begin your Description of Success. Remember that the important thing is to establish the gap between the current reality and a sustainable future. There will always be a pattern of looking back and forth between the two.

# Integrated Community Sustainability Planning

## Phase IV. Understanding the Sustainability Gap for Key Community Systems

Lessons learned from practitioners who have developed Descriptions of Success can be found in *Appendix 16: Lessons on Descriptions of Success*. Example Descriptions of Success from real ICSPs are provided in *Appendix 17 (Williams Lake, B.C.)* and *Appendix 18 (Whistler, B.C.)*.

### 5. Develop Descriptions of Current Reality for each key community system.

The Description of Current Reality (DoCR) should describe today's situation with the community system relative to the Description of Success, i.e. where are we today, relative to our Description of Success for this community system? It generally takes the form of:

- A list of five to seven key **sustainability challenges** facing the community in this system;
- A list of **community assets** (such as current initiatives, programs, relationships, policies, structures and other actions) that already exist in the community and can be leveraged as part of a coordinated movement toward sustainability. Assets may take the form of existing governance or management practices, infrastructure, 'green' initiatives or actions, community programs, public outreach campaigns, stakeholder dialogue, procurement criteria and so forth;
- An **analysis of key stakeholders** who are affected by and can influence the success of efforts to move the community system toward sustainability. The results of the stakeholder analysis will help to inform ideas for action. For example, it may be important to choose actions that will allow you to collaborate with those who stand to gain the most from your sustainability initiative.

Note that the Description of Current Reality should identify the main ways that this community system is currently contributing to violations of the sustainability principles. Note that the intent here is to perform a relatively high-level analysis to identify some high priority areas for action. You may find the results reveal the need for more detailed baseline analysis, in which case you can repeat the process using more sophisticated measures. These may include more detailed calculations of material and energy flows, or in-depth analysis on how the community system supports or undermines people's capacity to meet their basic human needs.

Note also that some groups may want to do a first draft of the Description of Current Reality **before** developing the Description of Success in order to have a sense of what the main sustainability challenges are, and then come back and revise the Description of Current Reality after developing the Description of Success.

Suggestions for a process to develop a Description of Current Reality are provided in *Appendix 19: How to Develop a Description of Current Reality*. *Appendix 20: Guiding Questions for the Four Sustainability Principles* are provided to help with the determination of key sustainability challenges. Guiding questions for undertaking an assets inventory is provided in *Appendix 21*.

### Hints & Tips

Don't let the current reality analysis overwhelm the entire process or document. Sustainability teams need to understand 'where the community system is' primarily as a means to empower the group to develop informed actions. Resist the tendency to create an extensive 'state-of-the-community system report'. Instead, concentrate on understanding priority gaps relative to a well-articulated vision and sustainability objectives, and on creating and prioritizing strategic actions.

# Integrated Community Sustainability Planning

## Phase IV. Understanding the Sustainability Gap for Key Community Systems

Lessons learned from practitioners who have developed Descriptions of Current Reality can be found in *Appendix 22: Lessons on Descriptions of Current Reality*. An example Description of Current Reality from a real ICSP is provided in *Appendix 23*.

### 6. Select performance indicators and targets.

Selecting performance indicators and targets is important in order to track and monitor your community's progress toward the descriptions of success for each key community system. A handful of key performance indicators and targets will help verify that your community is heading in the right direction and provide evidence to report on your successes and challenges later. Identifying the key performance indicators and targets will also help you ensure that the actions in your action plan are helping bridge the gap between current reality and success in each community system.

**Performance indicators are** pinpointed measures of performance that define controllable activities and outcomes in specific and measurable terms. **A target is a** specific measurable quantity which, when met, contributes to the achievement of our objectives.

**Together, performance indicators and targets help answer the question, "how will we know if we have achieved success and/or are making progress toward it?"**

### Hints & Tips

As you start considering specific indicators and targets, you may want to revisit parts of the Description of Current Reality and collect more detailed data to help you establish a particular target.

Suggestions for a process to develop performance indicators and targets in a community system are provided in *Appendix 24: How to Select Performance Indicators and Targets*.

### Going Deeper

**Whistler2020's Monitoring Program** tracks and reports the municipality's status and progress toward the Whistler2020 Vision through Core Indicators and Strategy Indicators. It is one of the best examples of alignment of indicators and reporting with the sustainability principles. Visit <http://www.whistler2020.ca/whistler/site/allIndicators3.acds?context=1967970&instanceid=1967971>.

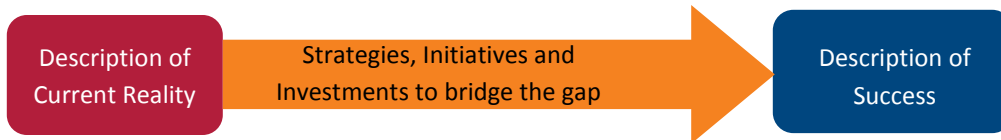
In the early stages of an ICSP, it may be useful to start with indicators that are both relevant to the description of success and that are already being tracked within your community. The data gathering mechanisms that your community already has in place can provide a foundation upon which to build up more detailed measurement systems over time.

Creating a system to track and monitor performance is important and is covered in more detail in the process element "Continuing the Journey and Monitoring Progress" on page 52. There are a number of tools and approaches that can help a community track and monitor performance in their selected indicators, each with different budget and resource implications. Whether the system chosen is simple or sophisticated, the key is to ensure that the data is being tracked in one centralized system that can be used for periodic reporting. The creation of the monitoring system, however, can come after the action plan has been developed. In fact, developing the system might even be one of the actions identified in the action planning tasks described in the next section.

# Integrated Community Sustainability Planning

## Phase V. Identifying Strategies and Initiatives to Bridge the Gap

The process of developing a Description of Success and of analyzing the current reality for each community system will have generated a number of ideas for initiatives and investments. The next ICSP phase is the part of the process where the community can dive into these and other ideas with great enthusiasm. It involves engaging community members in the generation of ideas for strategies, initiatives and investments to move the community from current reality toward success, sorting those ideas into short-term, medium-term and long-term priorities.



### Desired Outcomes

- Short-term, medium-term and long-term strategies, initiatives and investments have been prioritized for integration into business plans and budgets of the municipality and possibly other community partner organizations.

### Suggested Steps

Phase I – The Invitation

Phase II - Structuring the Process

Phase III – Community Visioning

Phase IV – Understanding the Sustainability Gap for Key Community Systems

Phase V – Identifying Strategies and Initiatives to Bridge the Gap

Step:	Tools / Worksheets:
1. Generate ideas for initiatives and investments.	<i>Appendix 25: Opportunities for Action</i> <i>Appendix 26: Sources for Innovative Actions</i>
2. Prioritize initiatives and investments based on strategic questions.	<i>Appendix 27: Guidance on Prioritizing Initiatives</i> <i>Appendix 28: Using the 3 Strategic Questions to Assess Initiatives – Case Study of Whistler’s Natural Gas Pipeline</i> <i>Appendix 29: Sustainability Filter</i>
3. Make a plan for implementation.	<i>Appendix 30: Action Implementation Summary Table</i>
4. Feed momentum by implementing some “low-hanging fruit” actions immediately.	
5. Compile priority initiatives into a single plan.	

Phase VI – Continuing the Journey and Monitoring Progress

# Integrated Community Sustainability Planning

## Phase V. Identifying Strategies and Initiatives to Bridge the Gap

### 1. Generate ideas for initiatives and investments.

Having developed a compelling Description of Success and of Current Reality in each key community system, the **next important step is to generate a list of potential initiatives** the community could take in order to bridge the gap.

The **goal initially is to produce an unfiltered, un-prioritized list** of both simple and innovative actions, initiatives, and investments that may help you move toward the Description of Success in each key community system.

**While** the desired outcome is a list of priority initiatives to bridge the sustainability gap for each key community system, the **process of generating and screening actions does not necessarily have to be conducted in the same groups that established the Descriptions of Success and Current Reality for each community system.** In fact, **some cross-fertilization** of ideas across community systems is appropriate at this point in the process. If your community has used task forces to establish the sustainability gap in each community system, **encourage crossover among the task forces for the brainstorming of actions.** This is also a great **opportunity for broader community engagement**, as community members can be invited to suggest ideas to help the community bridge the sustainability gap for multiple or even all key community systems. This is an opportunity to be creative in your process design.

#### Hints & Tips

During brainstorming, it often happens that the ideas generated span a wide range of levels – i.e. from specific actions (e.g. invest in this piece of equipment) to broader strategies (e.g. expand energy efficiency efforts). **It can therefore be helpful to group some of the more detailed action ideas into broader “transition strategies”** – i.e. general strategic focus areas for bridging the gap between the current reality and success. This can help capture and categorize all of the ideas and also emphasize that ideas on both levels are helpful and necessary. *Appendix 24: Opportunities for Action* provides an overview and examples of two basic strategies – dematerialization and substitution – that will help your community achieve its strategic sustainability objectives. Consider reviewing this with your team before your brainstorming session.

#### Hints & Tips

One way of inspiring the flow of people’s creative juices would be to undertake a best practice scan related to the various community systems and present these to the group prior to a brainstorming session. The Federation of Canadian Municipalities’ Sustainable Communities website is an excellent resource for examples and best practices ([www.sustainablecommunities.fcm.ca](http://www.sustainablecommunities.fcm.ca)).

**Remember this is a brainstorming exercise, so allow for “wild ideas”** that today have **economic** challenges (e.g. solar energy being too expensive) or **technical** challenges (e.g. lack of refuelling infrastructure for hydrogen fuel cells), **because in the future these challenges may have been overcome.** The **reason to include** these “wild ideas” is because the community may want to make short-term investments that set the stage to allow these “wild ideas” to happen if conditions change, e.g. setting aside land (short-term) and forming a partnership with a local art and cultural authority (short-term) to build a solar-powered regional centre for the arts (long-term) when building materials drop in price and political momentum is built around the idea.

A few other suggestions:

- **Solicit input from a wide variety of colleagues, experts, and peers.** Consult with local business people, municipal officials, partner organizations, community groups or educational institutions. The community may even consider organizing a forum to invite experts on



# Integrated Community Sustainability Planning

## Phase V. Identifying Strategies and Initiatives to Bridge the Gap

the topic and solicit innovative ideas from a broad range of people. Be sure to allow enough time in this step of the process for research and creative brainstorming - i.e. it's not likely that all the good ideas will arise in a single meeting.

- **To help generate ideas, encourage participants to review the list of current assets, plans and programs you listed while you assessed the current reality of the community system.** Are there infrastructures and facilities that aren't being used to their full potential that you could factor into your brainstorming? Take a look at the ideas for "transition strategies" that may have arisen during the development of your Description of Success and the key performance indicators you identified earlier to help seed creative ideas for actions. Consider also your stakeholders analysis: which stakeholders can help with the transition and how?
- While there is **ample room for local creativity and flexibility in this step, there is also no need to recreate the wheel.** Seek out examples of innovative initiatives from other communities that might be relevant to your community. *Appendix 26: Sources for Innovative Actions* contains a number of sources to find innovative actions that other communities have undertaken.

### **2. Prioritize initiatives and investments based on strategic questions.**

**The ideas generated in the previous step must now be prioritized into** a plan to move the community step by step towards success in each community system. This could be where groups that have done the earlier work on Descriptions of Success and Current Reality could come back together to do the prioritization exercise. Or, the prioritization exercise could be done by municipal staff, community partners, the CAG or even Council. However you organize to undertake the prioritization of initiatives, the following three strategic questions should form the basis for prioritizing investments and initiatives:

- Does the initiative move us in the right direction** (i.e. toward our vision, our Description of Success in this community system and our alignment with the four sustainability principles)?
- Does the initiative serve as a flexible platform** (i.e. is it a stepping stone toward future moves)?
- Does the initiative provide an adequate return on investment?** Typically, this refers to a financial return, but can also refer to social or political returns.

### Hints & Tips

Many of the initiatives you are screening will involve **trade-offs**. For example, while they may support one of the sustainability principles, it may come at the cost of violating one or more others. When you identify trade-offs, think of ways to modify the initiative to overcome the trade-off. Even when you can't overcome a trade-off, the action may still be appropriate to invest in if (1) it creates a platform for future actions that can be taken, or (2) it helps to build capacity (e.g. human, social, and financial) to take future actions. Only discard initiatives that move your organization away from sustainability in the long-term.

Screening potential initiatives with these questions is meant to help determine if initiatives should be considered:

- In the short-term – i.e. 'easy wins' that can be implemented immediately or soon;
- In the medium-term – attractive ideas that should be implemented within the next annual planning/budgeting cycle or two. These actions may require integration with municipal or community partner business planning and budgeting processes;

# Integrated Community Sustainability Planning

## Phase V. Identifying Strategies and Initiatives to Bridge the Gap

- In the long-term – actions that may be too expensive or less strategic at this time or that may require preliminary steps in the short-term to lay the groundwork for them in the long-term.
- Not at all.

Initiatives that get a ‘yes’ on all three questions are good candidates as short-term priority initiatives – especially if they help set the stage for medium and longer-term initiatives. *Appendix 27: Guidance on Prioritizing Initiatives* provides support on how to answer the three strategic questions. See an example of a capital investment decision made using these questions in Appendix 28.

### Adaptive Management Approach to Decision-Making

Even in the absence of an ICSP – e.g. during the development period of the ICSP or for those communities who choose an adaptive management approach for decision-making as described in the Association of Municipalities of Ontario (AMO)’s ICSP Toolkit - the 3 strategic questions can act as a lens to help integrate sustainability into regular and ongoing decision-making processes in the municipality. *Appendix 29: Sustainability Filter* can serve as a quick referral guide to sustainable decision making within your community based on the three strategic questions.

#### 3. Make a plan for implementation.

Once priority initiatives have been identified, responsibility for implementation of the initiatives will need to be assigned. (Note that the responsible organization does not need to be the municipality. For example, if a local school program is identified as a “low-hanging fruit” project, then the local school or school board could be the group that is responsible for implementing the project.)

### Case Study

The District of North Vancouver (DNV) has a bold vision: “to be among the most sustainable communities in the world by 2020.”

In 2008, the DNV developed a draft sustainability plan to help them achieve this vision, compiling ideas from staff across all departments and measuring each against a set of criteria inspired by the backcasting approach of this guide.

Prioritized actions had to be:

1. Specific enough to be actionable – represents a project, program or policy that can be assigned to a project manager for further development;
2. Broad enough to be systematic – does not micromanage but provides clear direction;
3. Relevant to the vision – contributes to at least one of the values that will shape the DNV sustainability vision;
4. A flexible platform for further actions – does not tie the DNV down in ways that are rigid and unchangeable over time; and
5. Relevant to sustainability challenges – contributes to addressing the types of problems the DNV has identified and that need to be solved at the District.

Carbon neutrality emerged as one of the key priorities of the action plan, and the District has already begun to act on some of the recommendations in this area. They have implemented new, more efficient technology at the Municipal Hall and Operations Centre, and are gradually converting their fleet to bio-diesel and purchasing hybrid cars to replace less-efficient vehicles. The DNV’s internal Green Team is providing tips to employees on ways to reduce energy and resource consumption and is working to reduce employee carbon-footprints by supporting a shift to alternative modes of transportation and creating job-share and flexible work arrangements.

For more on the District of North Vancouver, visit [www.thenaturalstep.org/en/district-north-vancouver-bc](http://www.thenaturalstep.org/en/district-north-vancouver-bc).

# Integrated Community Sustainability Planning

## Phase V. Identifying Strategies and Initiatives to Bridge the Gap

At this point, it is important to outline the schedules, accountabilities, resource allocations, performance indicators and targets associated with each initiative. This information will form the beginnings of a quick-start action plan for the community. Consider creating a table of some kind to track how each initiative in the plan will be implemented, including:

- The initiative;
- Who is responsible for implementing the initiative (individuals and/or organizations);
- The major tasks or activities involved in implementing the initiative;
- An implementation schedule;
- What budget and resource allocations are necessary to implement the initiative; and
- The progress of implementation.

There are, of course, any number of forms the table can take, and the amount of information included in the table will vary among plans and organizations. An example worksheet to support this step can be found in *Appendix 30: Action Implementation Summary Table*.

#### 4. Feed momentum by implementing some “low-hanging fruit” actions immediately.

If the brainstorming process generates an action idea that everyone agrees can be implemented right away, then it is not necessary to wait until the end of the planning process to do so. In fact, it is better to implement some “low-hanging fruit” ideas as soon as possible to show progress early on. This will serve to energize the people who are working so hard in the planning process and demonstrate success to the broader community to gain their support.

#### 5. Compile priority initiatives into a single plan.

Once short-, medium-, and long-term initiatives have been identified for each key community system, the process leadership team should compile these into a single overarching plan for the community – the ICSP.

While doing this, the process leadership team should consider whether common initiatives and investments arise in more than one key community system – e.g. capital projects that will require that the municipality take a lead role. If an idea shows up as a priority initiative in more than one key community system, then this may be a signal that it is a “high-leverage” opportunity to move the community towards sustainability, i.e. an investment that is able to support the progress of more than one key community system.

Overall, the outcome of this process element is about creating a prioritized list of initiatives your community will adopt. Ultimately, the action plan should become the community’s ICSP and should be integrated with the business planning cycles of the municipality and other community partners. This will ensure its progress toward sustainability is evaluated regularly and continues to improve. The next section will provide some guidance on community partnerships and continuing your journey.

# Integrated Community Sustainability Planning

## Phase VI. Continuing the Journey and Monitoring Progress

Thus far, the focus of this guide has been the process for creating the first draft of an Integrated Community Sustainability Plan. However, one of the greatest challenges communities typically face is moving from planning to implementation. Sustainability plans are only successful if they achieve concrete results and become part of the official policies and practices of the community and its partners. They help a community move beyond the creation of the plan by creating a process by which strategies and initiatives can be developed, monitored and modified on an ongoing basis.

### Desired Outcomes

- A governance and partnerships approach has been established to guide the implementation of the ICSP in the community.
- The initiatives in the ICSP are being implemented in the community.
- Progress on the implementation of the ICSP is monitored and evaluated.

### Suggested Steps

Phase I – The Invitation	
Phase II - Structuring the Process	
Phase III – Community Visioning	
Phase IV – Understanding the Sustainability Gap for Key Community Systems	
Phase V – Identifying Strategies and Initiatives to Bridge the Gap	
Phase VI – Continuing the Journey and Monitoring Progress	
Step:	Tools / Worksheets:
1. Form partnerships with community stakeholders around implementation.	<i>Appendix 31 : Example ICSP Partnership Agreement</i> <i>Appendix 32:A Case Study in Community Partnership- Whistler</i>
2. Review the plan periodically.	
3. Report to stakeholders and celebrate success.	<i>Appendix 33 :Resources for Sustainability Reporting</i>
4. Integrate sustainability into operations on an on-going basis.	<i>Appendix 35 :Best Practices: Governance and Decision Making</i> <i>Appendix 34: Integrating Existing Planning Processes</i>

#### 1. Form partnerships with community stakeholders around implementation.

Since an ICSP will act as a long range high-level sustainability plan for the whole community, it will benefit by having community stakeholders as partners in the development and implementation of the plan. Community partners can sometimes provide staff resources during the ICSP development process, for example by participating on the Community Advisory Group or as task force members around specific and relevant community systems (i.e. a transit



# Integrated Community Sustainability Planning

## *Phase VI. Continuing the Journey and Monitoring Progress*

authority member and a local bike shop employee participating on the Transportation task force or a member of a local arts council and a local artisan participating on an Arts, Culture and Heritage task force).

It is also important to keep people involved on an ongoing basis after the plan has been developed. One of the key reasons communities fail to implement their plans is a lack of stakeholder involvement beyond the planning stage. This can be the result of burnout once the first round of the planning process is complete, a lack of implementation, or a lack of meaningful mechanisms for continued involvement. These problems can be avoided by ensuring staff and partners have the time, resources and mandate to participate in ongoing discussions about creative innovations that will help move the community toward its sustainability goals. One way to do so is to have community partners commit to implementing specific initiatives identified through the ICSP and collaborating around the implementation of the ICSP.

The actual formation of the partnerships may come early in the ICSP development process or it may come later in the process, depending on the awareness and interest of community partners. While the ideal case would be to have a number of community partners commit at the outset of the ICSP development, in some cases prospective partners may need to witness the ICSP process unfolding before agreeing to sign on formally as partners. Both approaches can work, and new partners can be added throughout the development and implementation of the ICSP. Whatever the timing, it is important to help prospective community partners understand what their organizations stand to gain by being involved – i.e. in addition to what the community gains from their involvement.

If your community is interested forming partnerships in the ICSP, consider entering into a signed partnership agreement (for an example of a partnership agreement, see *Appendix 31*.) The case study of Whistler in *Appendix 32* highlights the power and possibility of the partnership approach.

### *2. Review the plan periodically.*

One way to ensure that the plan is being put into action is by establishing a regular review process. If internal or external task forces have already been formed, then one ongoing role for these groups could be to help with the monitoring and evaluation of the implementation of the plan. It may be useful for the task forces or the process leadership team to meet with key decision makers so they can report to the rest of the group on what has been accomplished, and what challenges they are facing. These periodic reviews may result in changes to the plan as well as new ideas for implementation.

### *3. Report to stakeholders and celebrate success.*

One way to foster a culture of periodic reviews of the plan is to reporting to stakeholders on implementation progress. Sustainability reports that communicate the community's progress on the ICSP can range from simple documents that report on which parts of the plan are being implemented (such as a newsletter), to more detailed reports that present the annual change in indicators and are reviewed externally.

# Integrated Community Sustainability Planning

## Phase VI. Continuing the Journey and Monitoring Progress

Many communities have annual reports that focus on finances and major accomplishments. One reporting option is to have sustainability become a focus of the annual report. Another option is to produce a separate ICSP progress report or snapshot. Either way, you will want to cover the following two areas:

- Progress your community is making on its plan, i.e. which actions have been implemented and which have not been. One example is to report that 90 per cent of recommended actions for 2009 have been completed. It is very important to note your community's successes to date to keep people motivated and engaged.
- Information on your community's progress on the key performance indicators identified during the process, i.e. measuring progress toward your Descriptions of Success.

In preparing these reports, remember to focus on transparency and completeness (don't leave out unflattering details), and materiality (focus on what is relevant for each community system). See *Appendix 33: Resources for Sustainability Reporting* for examples of sustainability reporting to help your community share successes and lessons learned with others.

### Hints & Tips

As people become more engaged, it is likely that a few very keen and dedicated individuals will emerge as leaders. The community may consider taking advantage of their enthusiasm and dedication by forming a 'sustainability team'. This group or individual could be responsible for identifying opportunities for collaboration between different stakeholders or sectors of the community. They will be most effective when they act as a shared resource for the community and have enough authority and resources to make change a reality.

### Partners Come in All Shapes and Sizes!

You may be surprised to find that your community's ICSP presents an opportunity to partner with some organizations that may not be typical partners of the municipality. For example, Santropol Roulant is a Montreal-based meals-on-wheels program for individuals living with a loss of autonomy, seniors and individuals with disabilities. In 2007, the Roulant launched a program to move beyond short-term food security and toward long-term economic, social and environmental sustainability. They began by conducting a sustainability assessment and visioning exercise to determine how to embed sustainability into the services they offer and their plans for the future. Roulant staff identified eight priority areas: energy, water, food, materials, communications and outreach, transportation, policies and partnerships, and healthy communities.

Organizations like these that are interested in and committed to sustainability likely exist within your community. They are natural allies and potential partners in your community's ICSP.

For more on Santropol Roulant, visit [www.thenaturalstep.org/en/canada/santropol-roulant-montreal-quebec-canada](http://www.thenaturalstep.org/en/canada/santropol-roulant-montreal-quebec-canada).

As the community moves ahead with its ICSP, it will also be important to celebrate successes. Celebrating successes and letting people know about the progress you have made will serve to energize the people who have worked so hard to develop the plan and continue to build support for the process.

# Integrated Community Sustainability Planning

## Phase VI. Continuing the Journey and Monitoring Progress

### 4. Integrate sustainability into operations on an on-going basis.

Continuing the journey started with the development of an ICSP involves integrating sustainability into the way that the community functions. The aim is to move sustainability from a small side-project to a community priority guiding the direction of all community stakeholders including their research, development and operational practices. Although this comes at the end of the ICSP planning process, in some ways it is also the beginning because it allows people to discover and explore other ways to make sustainability a part of everything that the community does.

Some other suggestions for the ongoing integration of sustainability concepts into operations:

- **Provide opportunities to staff and stakeholders to learn and remain involved.** Staff members and stakeholders can be provided with educational opportunities and empowered to identify and act on sustainability solutions. Possible education programs include eLearning courses, speakers series, seminars on sustainability, courses on specialized skills required to fulfill your ICSP, and workshops with stakeholders to solve a specific problem. Other ideas include:
  - incorporating sustainability goals into job descriptions and performance reviews;
  - creating a sustainability suggestion box;
  - creating sustainability awards, competitions and incentives;
  - creating 'fast-track' approval processes for sustainability suggestions; and
  - encouraging collaboration amongst stakeholders and the community at large.
- **Review existing policy tools.** Every organization uses a variety of policy instruments to achieve their objectives. Existing tools such as regulatory documents, regulations and by-laws, expenditures, and financial incentives<sup>7</sup> should be reviewed to make sure they are consistent with the community's ICSP. For example, consider how a policy helps or hinders your community's efforts to achieve its sustainability goals. See *Appendix 34: Integrating Existing Planning Processes* for suggestions on integrating the ICSP with other community plans and processes. You may also want to develop new tools where relevant.
- **Embed sustainability into the municipal corporation.** Consider incorporating sustainability into the ongoing operations, governance and decision making at the municipal organization level. Some municipalities have developed a "Sustainability Filter" like the one in *Appendix 29* to aid in ongoing decision-making across the municipality. See *Appendix 35: Best Practices: Governance and Decision Making* for a list of best practices for incorporating sustainability into governance systems based on research into community sustainability planning.
- **Link funding and awards to ICSP goals** - Some municipalities require that proposals for internal and external funding include a section clearly outlining what impacts their actions will have on the community's sustainability goals and indicators. Some communities require potential recipients of community funds to answer questions related to the prioritization questions during the budgeting process. For example, the municipality can ask that new significant investments be scrutinized using the three strategic questions introduced on page 49. Similarly, local businesses, foundations and community groups could integrate these questions into their own organizational decision-making. Also, consider award programs (e.g. for the business or building with the greatest reduction in energy or water consumption), and grants for sustainable projects (e.g. watershed restoration) to encourage municipal staff and community members to consider innovative initiatives.

<sup>7</sup> Roseland, M. (2005) *Toward Sustainable Communities*. (2005). p. 31-40.



## Closing

Sustainability is about ensuring that our children and grandchildren have access to the same or better opportunities in life as we have now. Recycling a little bit more paper or using a little bit less energy in your organization is a good way to start, but these small changes alone won't be enough.

The purpose of this guide is to give you and your team the tools you need to begin creating transformational change within your community. By using this guide to develop an ICSP, your community can take an important step toward a sustainable future. The guide will help you establish a sustainability team with a shared understanding of sustainability, will highlight the relevance of sustainability for your community, will help to analyze your community's current reality and aid in the creation of strategic goals and objectives for the future. It lays out a process for brainstorming solutions to achieve these goals and objectives, developing an action plan and capitalizing on early wins. As you continue to refine, evaluate and implement your ICSP, you may choose to return to some of the tools and resources provided here to help support you on your journey. Eventually, you can make sustainability as much a part of work and life as health and safety are today.

Imagine yourself five, ten, twenty years down the road. Think of all the early seeds that will have been planted by taking small steps to raise awareness and incorporate sustainability into the fabric of your community. Think of how those seeds will have grown into a forest, and all the extraordinary things your community will do to contribute to the transformation of society. Think of the jobs that will have been created and families supported throughout the course of your community's journey. Think of all the learning that will have occurred – from the successes and failures – that will lead to new, unexpected creative developments within your community. Think of the unparalleled leadership it will have taken to invite co-workers, stakeholders, suppliers, community members and shareholders to the table to participate in an ongoing spiral of meaningful change.

More than ever before, we need leaders like you who care deeply enough to make change happen, even when the obstacles seem great. Your ICSP will help you and your team to identify the challenges your community faces and overcome them one by one.

We can create a world that we will be proud of passing on to future generations. Thank you for your leadership, commitment and passion – they will make this future a reality!



## Appendix 1: Backcasting Elaborated

*Adapted from: Cook, D. (2004). The Natural Step: Toward a Sustainable Society. Green Books: Foxhole. pp. 37 – 44.*

'Backcasting' is a fancy term for something we are all familiar with. The term refers to the idea of planning from a future desirable outcome, followed by the question: "what shall we do today to get there?" It is something that we all do as individuals. For example, let's say that a woman wants to become a lawyer. This woman holds this desirable outcome as the starting point for her planning process. She then asks herself what she needs to do today to help her arrive at this desirable outcome. Depending on her current situation, there may be a number of options for proceeding (e.g. financial resources she has available, her father may be a lawyer so could help, etc.). Likely, it will involve the process of going to university, then to law school, then articling, and so on and so forth. It may require that she put her studies on hold for a while in order to work to save money for school, however, even this step is part of her overall strategy to arrive at success.

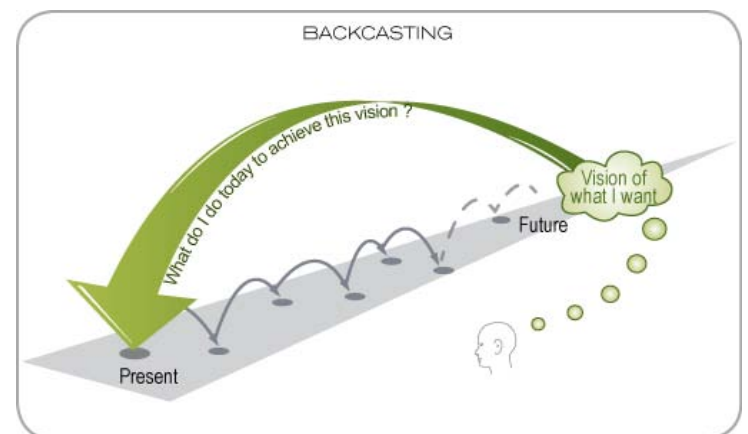
Backcasting allows a community to consider its desired future and then take the steps to reach that outcome. This helps to overcome one of the main challenges with sustainability planning, which is how to reconcile the need to be both pragmatic and idealistic. Backcasting addresses this dichotomy by suggesting that we need to be idealistic in our goals (what we want in the future) *and* pragmatic in the steps we take to get there (what we can do today).

Although it may be difficult to develop a shared understanding of success, the power of doing so is in how it can align the creativity, knowledge and skills of a group of people to achieve amazing results. For an example, consider the story of the Apollo moon missions (see Side Bar story on next page).

In this example, no single person or small group of people could achieve the desired result. It was only through a process of developing a shared understanding of success and engaging a diverse set of people that they were able to achieve the results that they did.

The challenge with large groups, like organizations and communities, is that we generally do not backcast. Rather, we prefer to 'forecast'. This means that we take past information to understand trends, and then project these trends out into the future. Plans are then based on trying to adapt to these trends. Backcasting can complement forecasting and can bring the following benefits:

*Backcasting is useful when the problem that the planning initiative is trying to address is complex and if current trends are part of the problem.* For example, consider strategic transportation planning. A common approach has been to examine current trends in a community, project the number of vehicles that will be on the road in the future and then plan the infrastructure to meet these projected future needs. However, in many cases increasing highway capacity actually accelerates the rate of increase in car usage; in other words, simply expanding capacity can trigger a positive feedback cycle and worsen the congestion and capacity problems it was meant to solve. In contrast, demand management strategies (DMS) involve setting a target for future demand and then backcasting from that desired outcome to the present in order to identify strategies to manage the trends driving demand (e.g. lack of alternatives;



## Appendix 1: Backcasting Elaborated

urban sprawl, etc.). The community may still need to expand the highway, but its strategy will include supporting initiatives (such as commuter or truck lanes or land-use changes) that may delay the need for the project and minimize future expansions (thereby saving money for other investments). In the case of planning toward sustainability, backcasting is a useful methodology because of the complexity of the sustainability challenge and the need to develop new ways of doing things in order to address these challenges.

*Backcasting also helps make sure we make the most effective use of our resources to achieve the desired outcome.* Often times in a planning process, the participants focus immediately on actions and initiatives, without first having a clear understanding of the desired outcome. Not having a clear understanding of the desired outcome between the participants in a planning process at the outset may lead to a number of initiatives and investments that appear disjointed and that may or may not contribute to the overall success of the community.

For example, think about the last time your family moved to a new home. You probably began by deciding on some conditions for a successful home, such as whether it was close to schools, close to work, had a certain number of bedrooms, and so on. After having a better idea of these principles of success, you then structured your resources to most effectively find this home. For example, you probably used the conditions as a screen to determine which homes to view. You probably did not just start viewing homes randomly hoping that you arrived at the one you wanted, as this would not be an effective use of your time and energy. If we build on the traffic example mentioned previously, simply following trends of growth in cars on the road would indicate that you should build a new highway to accommodate them. So that becomes your task: building a highway. But if the real goal is to reduce congestion and to provide convenient transportation systems, backcasting from that goal will allow you to identify all the possibilities. These may include investing the money that was going to go into the short-term solution (the highway) into a long-term solution (public transportation infrastructure).

*Backcasting allows us to be both pragmatic and idealistic.* The main premise of backcasting is to start your planning process with a desired future, and then ask what you can do today to reach that future. With respect to planning toward sustainability, the desired future is one in which the community is healthy and vibrant in a financial, social, cultural and environmental sense. The investments we make today should be fiscally responsible while acting as stepping stones toward that future. For example, many municipalities invest in energy efficiency measures as a first step, because they provide a financial return that can then be invested into subsequent investments. In addition, these investments should also allow the community to mitigate long term risks.

### Shared Understanding of Success and Amazing Results

The Apollo project was based on the efforts of specialists and companies in fields such as materials technology, astronomy, IT systems, mathematics, technology, physiology, medical science, and politics. The crucial thing was that all these people had the same conception of what the project was about. There were no differences of opinion about the goal. It was about going to the moon. And the overall conditions that needed to be managed were also the same, i.e. the distance between the earth and the moon, the fact that the moon has no atmosphere, that the moon moves round the earth, that the moon's gravity is weaker, etc. In the end, after careful planning and training, the project group managed to put an electric car on the moon. No individual could learn all the essential elements of such a complicated project in his or her lifetime. Yet a team with a pronounced diversity of knowledge, skills, and values, accomplished it together.



## Appendix 1: Backcasting Elaborated

*Backcasting as a planning methodology is adaptive.* Having an understanding of the desired outcome allows people to experiment with new initiatives. It can also act as a reference to help make corrections along the way and ensure that the process is on track. Ray Anderson, the CEO of Interface, applies the process of backcasting to his organization and shares the following story about the Apollo moon missions described earlier to reinforce the importance of having a clear idea of the destination. While on the way to the moon, the Apollo rockets were actually off-course 95 per cent of the time, and were only able to arrive to the moon through a series of mid-course corrections. These corrections could be made because the crew of the rocket had a very clear idea of their destination. In this sense, backcasting allows communities to experiment with initiatives and reflect on their effectiveness in reaching their goal, making midcourse corrections along the way.

### Success Story

Canmore is a mountain town in southern Alberta that is using backcasting to make its vision of a sustainable future a reality. To this end, they have created a formal screening process to evaluate all proposed developments in the community.

Before developers can apply to have a land use amendment or permit approved, they must demonstrate that their project is aligned with the guiding principles of Canmore's vision and contributes to the social, economic and environmental sustainability of the community.

Since the policy came into force in 2007, all new developments have met green building standards and many developers have partnered with community organizations, resulting in contributions to the town's affordable housing fund, formal 'adoption' of the local daycare and support for a local workshop and art gallery co-operative.

For more, visit <http://www.thenaturalstep.org/en/canada/town-canmore-alberta>.

## Appendix 2: Federal and Provincial ICSP Resources

### Canada

- **Infrastructure Canada** - An overview of resources related to sustainable community planning and development, including links to several federal government initiatives, is available at: <http://www.infc.gc.ca/links-liens/resources-ressources/resources-ressources-eng.html#a2>
- **Federation of Canadian Municipalities** - FCM's Green Municipal Fund offers grants to develop sustainable community plans. Plans must consider environmental, social and economic objectives and include specific targets for environmental performance.
- **Sustainable Cities** - Sustainable Cities is a small catalytic organization that tackles the daunting challenges of urban sustainability. Headquartered in Vancouver, Canada, with an active network of over 40 cities in 14 countries, Sustainable Cities is a think tank and a "do tank," with practical demonstration projects and peer learning networks, and scaling those lessons out through affiliations and high-profile events. Resources available at: <http://sustainablecities.net/>

### Alberta

- [Alberta Urban Municipalities Association - Municipal Sustainability Planning](#)  
Provides municipalities with municipal sustainability planning guides (similar to an ICSP) and resources, including The 5 Dimensions of MSP, the process of MSP, pre-planning assessment FAQs, and a list of related activities and events.
- [Alberta Association of Municipal Districts and Counties – Integrated Community Sustainability Planning tool](#) - Provides Districts and counties with a toolkit to help them develop their Municipality's ICSP.

### British Columbia

- [Royal Roads University - Community Research Connections - Sustainable Community Development](#)  
Research is dedicated to building civic literacy and useful knowledge for integrated decision-making around critical public policy issues, particularly, sustainable community development.
- [Simon Fraser University – Sustainable Communities: Centre for Sustainable Community Development](#)  
Supports the sustainable development of communities through research, education (credit and non-credit), and community mobilization; it provides research, training and advisory services throughout BC and Canada as well as internationally.
  - [Strategic Sustainability and Community Infrastructure](#)  
The project, among other things, explores strategic decision-making that makes the link between community sustainability values on the one hand, and public and private capital investment for community infrastructure (i.e. utilities, transportation, water and sewage, etc.) on the other.
- [Union of British Columbia Municipalities – Gas Tax/Public Transit](#)  
Provides British Columbia municipalities with background information, reports, program information, and resources for both the gas tax and public transit funds.
- [Capacity Building and Integrated Community Sustainability Planning Projects Program Guide](#)  
This program guide is meant to assist British Columbia municipalities in applying for funding under the Gas Tax Agreement's General Strategic Priorities Fund and Innovations Fund for capacity building and Integrated Community Sustainability Planning projects.

## Appendix 2: Federal and Provincial ICSP Resources

### Newfoundland and Labrador

- [Integrated community sustainability plan \(ICSP\) Guidebook and Framework](#) - a guide and framework prepared by the Department of Municipal affairs provides a guide and framework to facilitate the preparation of ICSP's.

### Nova Scotia

- [Canada-Nova Scotia Infrastructure Secretariat](#)  
Administers the federal-provincial agreements that provide funding to infrastructure projects in Nova Scotia.
  - [Integrated Community Sustainability Plans: Municipal Funding Agreement for Nova Scotia](#)  
A handbook prepared by Service Nova Scotia and Municipal Relations to serve as a guide for Nova Scotia municipalities to facilitate the preparation of their Integrated Community Sustainability Plans.

### Ontario

- [Association of Municipalities of Ontario](#) – A Guide and Case Studies for Integrated Community Sustainability Plans.
- [Ontario Ministry of Culture](#)  
Municipal cultural planning supports local economic development. The Government of Ontario is encouraging municipalities to integrate cultural planning into their daily business to emphasize local arts, cultural industries, heritage and libraries as they plan for the future of their communities.
- [Ontario Ministry of Public Infrastructure Renewal – Places to Grow](#)  
Places to Grow is the Ontario government's program to manage growth and development in Ontario in a way that supports economic prosperity, protects the environment and helps communities achieve a high quality of life.
- [University of Waterloo - Centre for Cultural Management](#)  
Undertakes a broad range of activities providing leadership in cultural management education and research. Their Web site serves a widespread community of cultural managers, trustees and other interested individuals and organizations, and provides management resources.

### Quebec

- [Université du Québec à Montréal – Département d'études urbaines : URBATOD](#)  
This research project examined how to make « transit-oriented development » (TOD) a practical, operational reality for cities, developers, transportation companies, specialists and the departments concerned. The project's website provides lessons learned from several case studies.

### Yukon

- [Yukon Government – Gas Tax Fund: Integrated Community Sustainability Plans](#)  
Communities receiving gas tax funding are expected to produce an ICSP that sets out their values and defines environmental, cultural, social and economic objectives.
  - [Integrated Community Sustainability Plan Template](#)  
The Yukon has developed an ICSP template to simplify the planning process and enable communities to incorporate existing plans, including official community plans.

## Appendix 3: Emerging Sustainability Issues Exercise

1. **Listen** to a short presentation by the facilitator on some emerging sustainability issues for communities. **Jot down** any questions of clarification that you may have. We'll hear a sample of your questions before we proceed.

2. Individually, take two minutes to:

- rank the relevance of each issue to your organization on a scale of 1-5.
- add one other issue that you feel is relevant that has not been mentioned.

3. In your table groups, **discuss** your ranking with your peers and **share** the reasoning behind each of your rankings. **Calculate** your table's average ranking for each issue. **Choose** two issues that received an average score of 4-5, and **describe** a way that your organization addresses them in your planning. We'll hear a sample of your suggestions in the large group.

Overall, resources are becoming scarcer. In general, this has led to rising resource – i.e. energy, water, etc. – and waste management costs. How relevant is this to your community (and/or the businesses and organizations in your community)?

1	2	3	4	5
<i>Not Relevant</i>		<i>Relevant</i>		<i>Very Relevant</i>

Increasingly, consumers are shifting their preferences toward 'green' and 'socially responsible' products and services. How relevant is this to your community (and/or the businesses and organizations in your community)?

1	2	3	4	5
<i>Not Relevant</i>		<i>Relevant</i>		<i>Very Relevant</i>

University graduates are expressing higher expectations of corporate sustainability performance. This can lead to tougher access to top talent when seeking new employees. How relevant is this to your community (and/or the businesses and organizations in your community)?

1	2	3	4	5
<i>Not Relevant</i>		<i>Relevant</i>		<i>Very Relevant</i>

Generally, people are more productive when their personal values are aligned with those of the organization they work for. How relevant is this to your community (and/or the businesses and organizations in your community)?

1	2	3	4	5
<i>Not Relevant</i>		<i>Relevant</i>		<i>Very Relevant</i>

## Appendix 3: Emerging Sustainability Issues Exercise

In the public interest, governments are imposing stricter environmental and human rights legislation. How relevant is this to your community (and/or the businesses and organizations in your community)?

1                      2                      3                      4                      5  
*Not Relevant*                      *Relevant*                      *Very Relevant*

Investors are increasingly asking questions about the projects and companies they support, which can lead to tougher access to capital. How relevant is this to your community (and/or the businesses and organizations in your community)?

1                      2                      3                      4                      5  
*Not Relevant*                      *Relevant*                      *Very Relevant*

Your emerging sustainability issue: .....

.....  
1                      2                      3                      4                      5  
*Not Relevant*                      *Relevant*                      *Very Relevant*



## Appendix 4: Composition of a Citizens Advisory Group

The CAG should consist of individuals who are well respected in the community, who can act as champions for the process, and who municipal staff can go to for advice on issues that may arise throughout the planning process.

In forming the CAG, consider the following questions:

- Can we find representatives from all the social, cultural, environmental, economic and governance dimensions of the community?
- What are the major businesses / sectors in my community?
- What other major actors are there in my community (e.g. school)?
- What non-governmental organizations should be involved (e.g. a local environmental, cultural or social services group)?
- Who are the biggest potential opponents of sustainability planning?

One planning guide author offers the following advice to identify community leaders:

...think of some character traits that you will want in your core team: people who are energetic, intelligent, upbeat — in short, people who are driven to see a vision implemented despite any barriers. Think of people you always seem to see at local events, who make you wonder where they find the time to always be involved.<sup>8</sup>

Many communities prefer to keep their CAG somewhere between 8 to 12 people; of course, this may vary depending on the size of your community.<sup>9</sup>

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<sup>8</sup> Halsmith, G. et al. (2005) p. 21

<sup>9</sup> *Appendix 8: imagineCALGARY's Vision Process* and *Appendix 9: Town of Canmore's Visioning Process* provides examples of community advisory groups in the City of Calgary and the Town of Canmore.



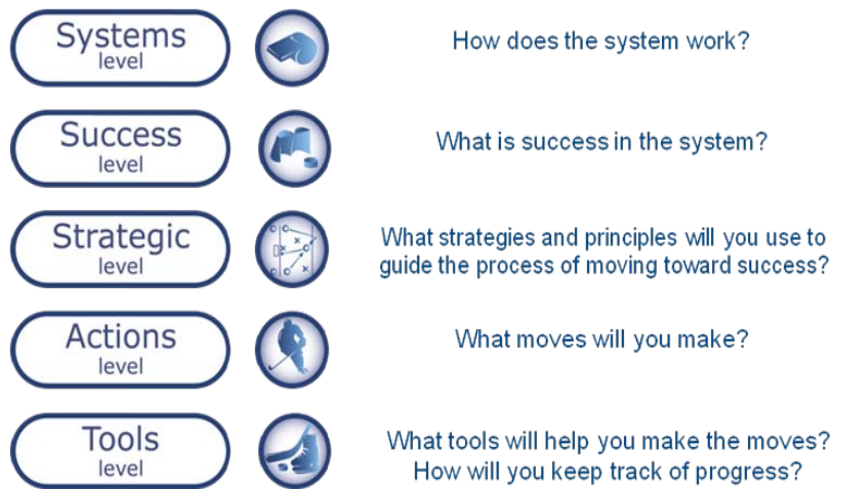
# Appendix 5: How Various Sustainable Communities Principles and Approaches Relate

Smart Growth, The Natural Step Framework, Agenda 21, The Melbourne Principles, Adaptive Management, MetroQuest, Genuine Progress Indicators, LEED, Vital Signs... The wide range of available tools, principles and approaches for sustainable community development can be confusing for ICSP process leaders, participants and citizens. What aspects of sustainability are covered by the respective tools, and which are the gaps that need to be covered by other tools? Which of those tools do we need for a given planning endeavor, and which tools can we do without?

Although it can feel to some that by adopting one such tool or approach, a community is choosing *not* to adopt other approaches, the reality is that these various tools and approaches can be used in a complimentary fashion. Most communities will want to develop an approach that is specific to their community, drawing on the various recognized tools and approaches and adapting them for a process designed specifically for its unique circumstances and culture.

To do so, we need to understand the connections between the various principles and approaches. The adjacent five-level model for any complex planning endeavour<sup>10</sup> can help explain those relationships.

In the context of planning for sustainability, the system with which we are concerned is comprised of human societies and the surrounding ecosystem. Planning in this system must be based on an understanding of the principles of how the system functions (e.g. laws of thermodynamics, biogeochemical cycles, ecological interdependence of species, basic human needs, the societal exchange with and dependency on the ecosphere, etc.). These are the “rules of the game” at the **systems level**.



Distinguishing among the remaining four levels can help clarify the function of a particular approach and its relationship to other tools for sustainable community development. This helps planners and practitioners understand how they can be used in a complimentary fashion.

For example, consider the **success** level. Success is described at a high level by the widely-used definition of sustainable development first coined by the United Nations’ Brundtland Commission: “To meet the needs of the present without compromising the ability of future generations to meet their own needs.” The four sustainability principles used in The Natural Step Framework (see p. 10) build this definition out further by articulating the four main ways by which we are currently compromising the ability of future generations to meet their needs and translating them into a set of complementary, non-overlapping conditions for a sustainable society. In this sense, they define success at the highest

<sup>10</sup> This five-level model was used by the pioneers of a number of sustainable development tools and approaches (e.g. Natural Capitalism, Zero Emissions, Ecological Footprint, The Natural Step, etc...) to explain the relationship of these approaches to one another and to sustainability. (Robèrt, K.H. et al. Strategic sustainable development – selection, design and synergy of applied tools, Journal of Cleaner Production 10 (2002) 197–214).

# Appendix 5: How Various Sustainable Communities Principles and Approaches Relate

level for a sustainable community planning initiative; they are “first-order” principles, helping frame a description of future success that is sustainable.

On the other hand, many other sets of principles are used by communities to guide their work on sustainability. Often, such principles articulate **strategies** that can help guide the *process* of moving the community toward sustainability. For example, consider process principles such as collaboration and inclusiveness or the precautionary principle. The backcasting approach described in this guide could also be considered a process strategy. So too could other sets of principles such as “Smart Growth” principles and most of the Melbourne Principles.

The concrete measures (e.g. recycling; switching to renewable energy; etc..) that a community takes to act on their strategies to reach success in the system are numerous and are on the **action** level. Numerous tools exist to monitor and communicate progress and to facilitate action, and many of these **tools** are either specific to communities (e.g. “Vital Signs” indicators) or broadly-used but applicable in a community context (e.g. LEED green building rating system).

Some sets of principles for sustainable communities contain principles that relate to more than one level in this model. For example, most of the Melbourne Principles address the *process* of moving toward sustainability (e.g. “empower people and foster participation”), while others point to types of *actions* (e.g. “Promote sustainable production and consumption, through appropriate use of environmentally sound technologies and effective demand management”) or even specific tools (e.g. “enable communities to reduce their ecological footprint”).



It is important to note that no set of principles is inherently better than others – they are simply designed for different purposes. Any integrated community sustainability planning initiative requires tools and principles at all five levels. That said, having a strong understanding of *success* is fundamental to the backcasting approach laid out in this guide and can help a community select and design the most appropriate strategies, actions and tools for their unique journey to sustainability. The sustainability principles used in The Natural Step Framework were developed with this in mind.



## Appendix 6: Sample Council Resolution

(Note: this is a summary of a draft resolution.)

### COUNTY OF HAWAI‘I STATE OF HAWAI‘I

#### RESOLUTION NO. \_\_\_\_

A RESOLUTION DECLARING THE COUNTY OF HAWAI‘I’S COMMITMENT TO SUSTAINABILITY PRINCIPLES BY SETTING A PATH TOWARD IMPLEMENTATION OF THE POLICIES DEVELOPED BY THE MAYOR’S GREEN TEAM.

**WHEREAS**, the County of Hawai‘i is both consumer and steward of our Island community and its resources and should encourage cost savings measures that minimize the County’s impact on the land to ensure the needs of tomorrow can be met; and

**WHEREAS**, the adoption of four sustainability principles can provide a holistic framework that will assist County employees and elected officials towards a more sustainable direction collectively; and

**WHEREAS**, these sustainability principles are scientifically rigorous, internationally recognized, successfully implemented across the world, and offers concrete and simple ways to accelerate change toward sustainability;

**WHEREAS**, these sustainability principles are reflected as:

1. Reduce and eventually eliminate our contribution to the progressive build-up of materials (such as fossil fuel and their associated wastes) that are extracted from the earth’s crust;
2. Reduce and eventually eliminate our contribution to the progressive build-up of synthetic materials produced by human society;
3. Reduce and eventually eliminate our contribution to the ongoing physical degradation of the earth; and
4. Reduce and eventually eliminate our contribution to conditions that undermine people’s ability to meet their basic needs; now, therefore,

**BE IT RESOLVED BY THE COUNCIL OF THE COUNTY OF HAWAI‘I** that the County of Hawai‘i declares its commitment to sustainability as outlined above and its intent to adopt the sustainability principles and goals by formalizing the County of Hawai‘i Mayor’s Green Team.

**BE IT FURTHER RESOLVED**, that the County of Hawai‘i will approach decisions about policies, operations and capital improvements in a more systematic way. Using sustainability framework, the County of Hawai‘i Green Team will:

- Work to increase awareness of sustainability among its staff and management. This will provide us with a common language and keep all of us thinking about the impact we have during the course of our daily tasks.
- Take an inventory of current efforts that make progress toward sustainability and do a baseline assessment based on the Local Government Operation Protocol (LGOP) to enhance our current efforts and identify additional improvements.
- Formulate a vision of what sustainability means for the County of Hawai‘i and identify short-term, medium-term, and long-term goals and benchmarks necessary to achieve that vision.



## Appendix 6: Sample Council Resolution

- Incorporate the awareness and terminology of sustainability into our budget decisions, program administration and project development.

To achieve this, the County of Hawai‘i will ask questions of relevant projects or policies like:

- Does this help move the County of Hawai‘i toward sustainability (even if incrementally)?
- Will elements of this project serve as a potential stepping stone toward other changes or initiatives?
- Will increased implementation costs yield savings in the long-run or provide a social or environmental return on investment?

Dated at \_\_\_\_\_, Hawai‘i, this \_\_\_\_ day of \_\_\_\_\_, 2009.

INTRODUCED BY:

\_\_\_\_\_

COUNCIL MEMBER, COUNTY OF HAWAI‘I

## Appendix 7: Example of a Sustainability Declaration

### A Sustainability Declaration

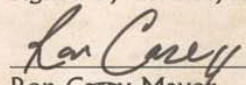
**A**s Mayor and Councillors of the Town of Canmore, we acknowledge society's desire to create a stable, sustainable future. We further acknowledge that such a future is not certain, and that it will take the good will and determined work of many individuals, organizations, and communities around the world to achieve our goal.

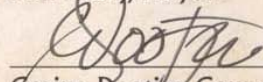
**W**e are proud to be part of a community as rich in natural amenities, economic opportunities, and social possibilities as Canmore, and to be working on behalf of a future in which our economy, environment, society and governance are integrated in ways that foster vibrant communities, strong economies, and healthy ecosystems. To that end, we commit ourselves to creating the conditions necessary for a sustainable future. By seeking innovative and flexible solutions to the challenges that confront us, by sharing our knowledge, and by coordinating our actions, we strive to:

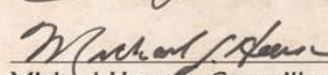
- Reduce and eventually eliminate our contribution to the progressive buildup of materials (and their associated wastes) that are extracted from the Earth's crust;
- Reduce and eventually eliminate our contribution to the progressive buildup of synthetic materials produced by society;
- Reduce and eventually eliminate our contribution to the ongoing physical degradation of Nature; and
- Reduce and eventually eliminate our contribution to conditions that undermine people's ability to meet their basic needs.

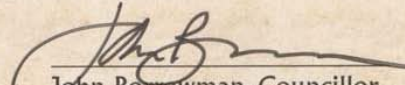
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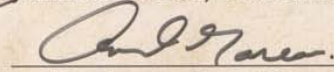
Signed by the Mayor and Councillors of the Town of Canmore

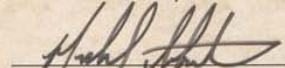
  
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Ron Casey, Mayor

  
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Corina Dootjes, Councillor

  
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Michael Heenan, Councillor

  
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John Borrowman, Councillor

  
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Andre Gareau, Councillor

  
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Mike Western, Councillor

## Appendix 8: imagineCALGARY's Visioning Process

The City of Calgary engaged in a process to develop a 100-year vision for a sustainable Calgary. A key component of “imagineCALGARY” was broad consultation with citizens to gather input on their vision and values for Calgary. More than 17,000 citizens in Calgary took part in a dialogue about the future of their community by answering five questions:

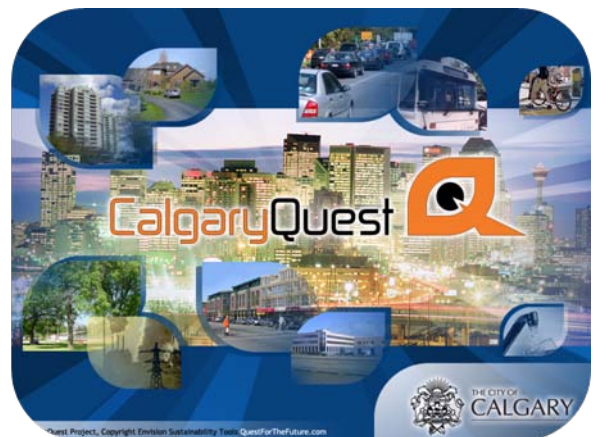
- 1) “What do you value about Calgary?”
- 2) “What is it like for you to live here?”
- 3) “What changes would you like to most see?”
- 4) “What are your hopes and dreams for Calgary in 100 years?”
- 5) “How could you help make this happen?”

A Citizens’ Round Table was set up to synthesize the input from the community to produce a vision statement. The Round Table was comprised of nearly 40 citizen volunteers who studied the answers, sorting through mountains of other information and working with a variety of experts to write the 100-year vision and identify targets and strategies toward reaching the vision. These citizens were recruited through a rigorous process to ensure that a wide variety of experiences and affiliations were represented.

In addition to the Round Table, a number of other volunteer citizen groups were set up. These include: five Working Groups to develop 30 year targets and strategies towards the vision, Advisors who are a variety of experts and interested people to support the Round Table and Working Groups throughout the process and a Mayor’s Panel of community leaders to help ensure the legacy of imagineCALGARY is embraced and acted upon by institutions and groups throughout the city.

The imagineCALGARY team used a number of creative ways to engage citizens. They organized “Imagining Sessions” ranging from 30 minutes to 3 hours to talk with various groups about the questions. These sessions utilize an interactive tool called CalgaryQuest. CalgaryQuest is a scenario exploration tool that shows users the long-term (40 year) outcomes of different choices and highlights connections between choices and outcomes. This allowed audiences to see the integrated nature of issues within the region. Audiences created future scenarios by deciding on a range of options within a number of areas, including:

- Population location
- Job location
- Development density
- Transit plan





## Appendix 8: imagineCALGARY's Visioning Process

- Transportation options
- Energy & air quality programs
- Reduce & recycle programs
- Water conservation programs
- Population growth
- Economic growth

Audience members discussed why they made different choices in these areas and debated the merits of these decisions. Using visually appealing and interactive ways to display the outcomes of these choices, CalgaryQuest allowed the audience to then see what Calgary could look like in 40 years, based on their decisions. Rather than focusing on the details of individual maps or charts, discussions in CalgaryQuest sessions focused on the connectedness of issues and how different choices can create different futures.

Citizens were invited to public interactive sessions where they were asked to provide their input on the criteria above and then immediately received feedback about how these decisions affect the growth of Calgary.

They also engaged schools to develop programs for students to talk to their parents and community leaders about the questions. Some lucky students had the opportunity to interview players from the Calgary Stampeders, well-known media personalities and even Alberta's Lieutenant Governor!

For more information see the imagineCALGARY website: <http://www.imaginecalgary.ca>

## Appendix 9: Canmore's Visioning Process

As a community experiencing rapid physical and cultural transition, the Town of Canmore instigated a pioneering grassroots visioning process in late 2004. Called *Mining the Future*, the effort combined grassroots dialogue, on-line data collection and scenario building to identify common concerns and values, give voice to community aspirations and forge a clearly-articulated vision that would direct municipal planning and policy for the next decade.

Over ten months, some 50 “conversation groups” comprising established community groups (service clubs, church groups, schools, etc.) and ad hoc neighbourhood groups meet for five rounds of facilitated conversation. Each round, employing the “World Café” conversation methodology ([www.theworldcafe.com](http://www.theworldcafe.com)), addressed a specific set of questions on topics ranging from desirable community attributes to emerging trends and the causes of the current changes. The results were quickly gathered and compiled using a web-based technology and posted on a *Mining the Future* website. The website, aside from serving as an information and coordination



hub, provided a means by which residents who are unable or disinclined to participate in neighbourhood or community groups could contribute through on-line surveys. *Mining the Future* also involved three larger “Canmore Cafés,” large civic gatherings open to all residents in which participants could hear the latest on the process, exchange information and ideas, and work together on yet more visioning questions.

The leaders of the neighbourhood and community groups met periodically with the visioning team leaders to assess the data, build scenarios that represent potential futures for Canmore and, using the scenarios as guides, create a vision for the community. According to Lawrence Wilkinson, one top practitioner of scenario planning, “scenario planning derives from the observation that, given the impossibility of knowing precisely how the future will play out, a good decision or strategy to adopt is one that plays out well across several possible futures. To find that ‘robust’ strategy, scenarios are created in plural, such that each scenario diverges markedly from the others. These sets of scenarios are, essentially, specially constructed stories about the future, each one modeling a distinct, plausible world in which we might someday have to live and work.”

The initial conversations yielded four to six scenarios that were winnowed down to two based on what participants believed represented the most desirable and realistic possibilities for the Town. Developing the vision from the final two scenarios required excellent process and great leadership.

Given a community sustainability mandate and the Town of Canmore’s prior commitment to The Natural Step as an approach to sustainability, the visioning project team scrutinized the scenarios through the “lens” of sustainability principles used in The Natural Step Framework. This meant that the project team considered the following questions:





## Appendix 9: Canmore's Visioning Process

- 1) Does the described scenario include systems that would lead to a systematic increase of concentration of substances from the Earth's crust? If so, how could these systems be adapted so this is not the case?
- 2) Does this scenario include systems that would lead to a systematic increase in concentration of substances produced by society? If so, how could these systems be adapted so this is not the case?
- 3) Does this scenario include systems that would lead to a systematic physical degradation of nature? If so, how could these systems be adapted so this is not the case?
- 4) Does this scenario include systems that would undermine the ability of people to meet their needs? If so, how could these systems be adapted so this is not the case?

Once the team and community were able to comfortably answer “no” to these questions, they felt assured that their community was moving towards a scenario that is both *desirable* and *sustainable*.

The vision provides the values and the issues foundation for increasingly refined and integrated sustainability planning and implementation. A citizen “learning group” identified during the visioning process will work with the Town on implementation strategies and accountability in political, cultural, social, economic, and environment domains.



## Appendix 10: Writing Vision Statements

Adapted from: *Taking Action for Sustainability: The EarthCat Guide to Community Development*. pp. 49-50

Rendering the volumes of scattered ideas that will have come in from the public feedback sessions into concise but broadly inclusive statements can be a Herculean task. It will undoubtedly feel like you are leaving volumes of information out, but it is necessary to synthesize the information down to a clear and intentional statement. This will help your community orient itself as it moves to the future. The following tasks will help you to navigate this challenge in a way that remains inclusive of the public while allowing you to bring the process to a conclusion.

Select one or two people, or a subcommittee of the Stakeholder Group [*or Citizens Advisory Group*], to take all the ideas from the visioning sessions and pull them together in a coherent vision statement. Keep the following tips in mind:

- √ Write the vision in clear, active language.
- √ Reference a reasonable point in the future.
- √ Speak about what the community will look and feel like when you achieve your goals.
- √ Make it accessible to everyone; avoid jargon.
- √ Be sure to address all five main areas of sustainability: social well-being, good governance, vibrant local economy, efficient services and infrastructure, and healthy natural environment.
- √ Build on existing strengths in your community — a vision is most powerful when it has a credible foundation. If you create a vision based on the strengths of the community — on successes that have already occurred, on community events and parks and places you love and are proud of — you give people reason to think the vision can become a reality.

It can be helpful to ask some prominent writers in your community to assist with the drafting of the vision statement. While it doesn't need to qualify as literature, it is desirable to keep the wording lively, avoiding dry, bureaucratic language. Plus, having a celebrity involved is always good for credibility and visibility. Above all, keep the final version as simple as possible. A simple vision statement will be remembered, and is thus more likely to become a continuing influence on your community's actions and attitudes.



## Appendix 11: Sample Vision Statements

The following is a sampling of vision statements from various communities.

- **Wolfville, Nova Scotia (pop. 3,800)**

“Wolfville is a vibrant and versatile university town. It is a town rich in natural, built and cultural heritage. Its citizens, businesses, institutions and government value and protect our natural environment, economic vitality, social equity, life long learning, cultural diversity and heritage. Everyone accepts responsibility for making decisions that lead to a healthy, equitable and sustainable future

Guided by principles of sustainability, we will work towards achieving the following objectives:

- An inclusive community based on social equity and guided by citizen engagement through ongoing public consultation;
- A community that fosters and supports affordable housing, a healthy business sector and a creative and adaptive economy;
- A community whose energy needs are reduced and largely met by renewable resources;
- A community where our food and material needs are produced locally, wherever possible;
- A community in which the natural environment is respected and protected as our most valuable asset;
- A community where pollution is reduced and solid waste production is minimized and increasingly recycled;
- A community with active transportation networks where people do not have to depend on the automobile either for their mobility within the community or their links to the larger world.”

- **York Region, Ontario (pop.900,000)**

“York Region: Creating Strong, Caring and Safe Communities:

- Quality Communities for a Diverse Population
- Enhanced Environment, Heritage and Culture
- A Vibrant Economy
- Responding to the Needs of Our Residents
- Housing Choices for Our Residents
- Managed and Balanced Growth
- Infrastructure for a Growing Region
- Engaged Communities and a Responsive Region”

- **City of Airdrie, Alberta (pop. 38,000)**

“Airdrie is a vibrant, caring community rich in urban amenities and opportunities for everyone. We value a healthy, sustainable environment connecting people and places.”

- **Resort Municipality of Whistler’s Vision Statement (pop. 10,000)**

“Whistler will be the premier mountain resort community – as we move towards sustainability



## Appendix 11: Sample Vision Statements

We are committed to achieving social and environmental sustainability and a healthy economy. We will continue to build a thriving resort community that houses 75% of the workforce in Whistler. We will continue to offer world-class recreational and cultural opportunities for our visitor and residents. We will foster sustained prosperity in our local tourism economy and retain our local businesses. We will continue to strive to protect the local integrity of our local environment. We will meet the social, health, and learning needs of residents and visitors.

We will be a safe community that provides peaceful enjoyment of our activities and places. We will foster cooperation between regional communities and the provincial government on initiatives to expand prosperity and well-being for all. We will monitor our performance at achieving Whistler's vision and report back to the community on an ongoing basis."

- **Canmore, Alberta (pop. 12,000)**

"As citizens of Canmore, we are proud of our community's mining and mountain heritage, of the inspiring mountain landscape and the rich natural environment we share with species that define the Canadian West and wilderness, of the astonishing range of skills and talents demonstrated by our residents, of our exceptional commitment to the well-being of others in the community, and of our collective effort to be leaders in finding solutions to the challenges that confront our own and other mountain communities.

Understanding where we have come from, and what we value today, we imagine a future in which Canmore is:

- An accessible, friendly, inclusive and closely-knit community with a small town feel and a distinct identity anchored in its mountain surroundings and its mining past;
- A community populated by a wide range of individuals and families from different backgrounds and of different ages, interests, values, skills and economic means;
- A community that supports its diverse population with affordable housing, a strong and varied economy, a healthy environment, a full array of social services, abundant open space and ample opportunities for recreation and artistic expression;
- A community that acknowledges and works within the limits imposed by its geography and ecology, and that uses the best the world has to offer in designing a built environment that respects and is worthy of its natural environment;
- A community that has become a leader in integrating its social, economic and environmental activities in ways that ensure its future generations will enjoy the same opportunities and quality of life as its current generations.
- The Canmore of the future is a prosperous, vital, and vibrant community. Its great strength is its varied, resourceful, and engaged citizens, who thrive together on the strength of the community's long-term commitment to the diversity of its people and the health of the mountain landscape that shapes and sustains it."

- **Olds, Alberta (pop. 7,000)**

"Olds is an environmental leader in a progressive, sustainable community providing substantial opportunities."

- **Town of Sidney, B.C. (pop. 11,300)**

"The overall vision of the Town of Sidney is of a balanced, vibrant waterfront community with a revitalized town centre, which caters to residents, visitors and businesses through the provision of a broad range of services including: efficient transportation, tourist amenities, and cultural and social activities for all segments of the community, while affording optimal opportunities for industrial and commercial development."



## Appendix 11: Sample Vision Statements

- **Guelph, Ontario (pop. 115,000)**

“Guelph is a caring community, diverse in its heritage, vibrant in its neighbourhoods and dedicated to: People, Environment, Innovation, Investment - A place to live, work, learn and play ... a great place to call home.”

- **Nanaimo, B.C. (pop. 80,000)**

“Nanaimo will be a community that respects people. It will hold neighbourhoods as the building blocks of the city. Nanaimo will be safe and supportive for people of all ages and all income levels. It will be an attractive place to live with the historic downtown core forming the “heart” of the city. Change in the city will be based on the foundation of community participation. Nanaimo will be a community that respects and preserves the environment and one that is pedestrian friendly. It will be a city of social and economic opportunity that has a diverse economy and a wide range of social, recreational, cultural and artistic amenities and services.”

- **City of Geneva, New York (pop.13,600)**

“The City of Geneva, New York will be a great place to live, work and invest with a commitment to positive open communication and community pride and a model community boasting vibrant residential neighbourhoods and downtown, and a strong economic environment.”

- **Hornby Island, B.C. (pop. 1,000)**

“Hornby Islander's have envisioned a future based on our community strengths and our desire to remain a diverse, sustainable and viable community. Central to this vision are the values that we share as a community - creating a balance with the natural world, working together co-operatively and peacefully, taking personal and collective responsibility for the well-being of the community, and celebrating the special spirit and energy of this unique island and its people.”

- **Windsor, Ontario (pop. 216,000)**

“Windsor, Canada's southernmost city and international gateway, is a diverse community of safe, caring neighbourhoods, with a vibrant economy and a healthy sustainable environment.”

- **Hamilton, Ontario (pop. 505,000)**

“As the citizens, businesses and government of the City of Hamilton we accept responsibility for making decisions that lead to a healthy, sustainable future. We celebrate our strengths as a vibrant, diverse City of natural beauty nestled around the Niagara Escarpment and Hamilton Harbour. We are able to achieve our full potential through access to clean air, safe water and food, shelter, education, satisfying employment, spirituality and culture. We weigh social, health, economic and environmental costs, benefits and risks equally when making decisions.”

# Appendix 12: Facilitator's Notes to Identify Key Community Systems

The following is only a suggested way to hold a meeting to achieve the meeting objectives. The reader should consider it a point of departure for designing their own meetings based on the situation of their community. For example, not all communities will use task forces to analyze the sustainability gap for key community systems.

## Objective of meeting:

- To create a list of key community systems that should be considered in order for the community to achieve its vision.
- To identify potential members for task forces that will be formed around each of these groupings.

**Time to Run:** 1 to 3 hours

**Materials:** Post-it notes, markers, flipchart paper

**Preparation for participants:** Review your community's vision

**Set-up:** Depending on the number of participants, you may want to first arrange participants into groups of 5 – 7 people. However, if your group is under 12 people then you can run the meeting as a single group.

## Agenda:

- 1) Review objective of meeting with all participants to make sure everyone is clear on what they are here to do. This should have been made clear when participants were invited to the meeting, but it doesn't hurt to remind them.
- 2) Review the community's vision. This is to set the tone of the meeting and to remind people why we are all here to begin with.
- 3) Individually, take 2 – 3 minutes to **consider** the question below. Over the next 20 minutes **share** your thoughts with your table members and write, draw, doodle or use whatever means you like to **capture** yours or others thoughts on a piece of flip chart paper.

### Hints & Tips

- Write the characteristics in clear, active language.
- Reference a reasonable point in the future (20 – 25 years).
- Speak about what your community will look and feel like when you achieve your vision.
- Make it accessible to everyone; avoid jargon.
- Build on existing strengths — a vision is most powerful when it has a credible foundation. If you create characteristics based on the strengths of the community — on successes that have already occurred, on community initiatives and assets you are proud of — you give people reason to think the vision can become a reality.

**For this exercise, step out into the future 20**

**– 25 years and imagine that future exactly the way you want it. Your granddaughter, grandson, adult son, daughter, niece or nephew is on the phone and telling you that they are thinking of moving back to your community.**

**What do you tell them about your community to assure them why that would be a good idea?**

## Appendix 12: Facilitator's Notes to Identify Key Community Systems

Create exciting and compelling characteristics of your community. Be descriptive and have the conversation in the present tense language – i.e. simply report what's going on as if it is happening right now.

Examples might include such things as:

- “Most of our food is grown locally and we have a great fall food festival that celebrates our various cultures. It is an awesome time and every one of all ages seems to be there. Your great Aunt Matilda still makes the best Spanish Paella...ever!”
- “We have a great transportation system and most people, especially those who live in the downtown, do not bother with owning a vehicle. And with work, live and play opportunities being so well integrated, most travel is done by foot or bicycle.”
- “Over the past 5 years we have seen some significant increases on our community's happiness index.”

4) At the end of the first round of conversation, one person **remains** at each table as the **host**, while the other 4 move to separate tables. Table hosts welcome newcomers to their tables and **share the essence** of that table's conversation so far. The **newcomers** relate any conversational threads which they are carrying -- and then the conversation continues for approximately 20 minutes.

5) At the end of the second round, participants return to their original table and then listen as the table hosts **share** with the rest of the group the highlights and key points from their table's conversations.

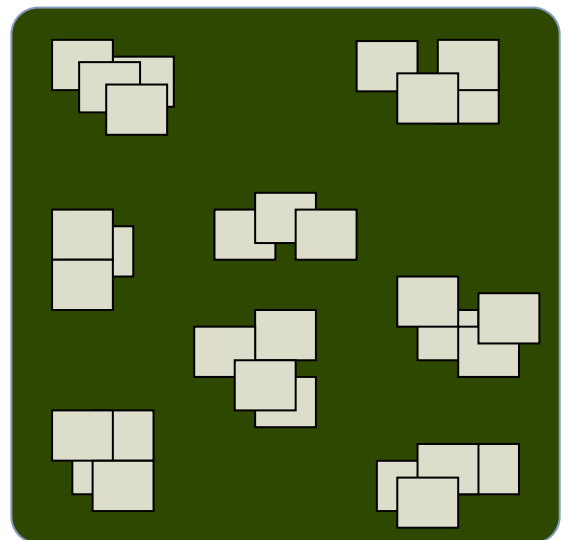
6) At your tables, **brainstorm** 7 - 10 theme areas that emerged from your previous conversations and capture these on post-it notes – one theme area per post-it note. Theme areas might include such things as energy, water, food, recreation, etc.

7) **Present** your table's theme areas to the rest of the group and **place** the post-it notes on the wall and **group** similar ideas.

By the end, the wall should look like the image to the right.

8) Assign a name to each grouping that captures the essence of the various themes, such as “Water”, “Arts & Culture”, etc. These various areas represent the key community systems that need to be addressed in order to achieve sustainability and the community's vision.

9) Thank everyone for their participation and remind them of a future meeting or next steps if there are some.





## Appendix 13: Tips on Engaging Task Forces Systems

Task forces are a good way to engage community members and stakeholders meaningfully in the ICSP. Using task forces can also provide the following benefits for the ICSP process:

- **Resources for Implementation:** Later on in the process, once the plan is written and the community moves into the implementation stage, task force members can play an important role to help implement the certain initiatives and investments. Involving stakeholders from the onset ensures that they will be on board when it comes time to implement the plan. For example, if someone from the local school board is involved at the onset, then they may propose and lead a community sustainability educational program. In this sense, the members of the task forces are key to supporting the implementation of the plan in addition to writing it.
- **Expertise and Networks:** There is a wealth of knowledge in each community, and task forces allow the community to take advantage of this expertise. In addition, task force members will also have access to networks of people, likely from outside the community, who can bring resources to the initiative. For example, a community group may have experience in writing proposals, or be aware of funding agencies that could provide resources to the initiatives.

If the community decides to go ahead with task forces for various community systems, community members – both supporters and critics - should be invited to join task forces where they have a particular expertise and/or resources to support implementation. A manageable size for each task force would be between 5 to 9 people.<sup>11</sup>

The task forces should be composed of key community stakeholders relevant to the community system, such as councillors, municipal staff, large employers, citizens groups, non-profit organizations, first nations, and other representative groups in the community (e.g. seniors, youth, etc).

When selecting potential task force members consider the following questions:

- *“Who are the experts in this community system?”* – In every community, there are people who have an interest and expertise on a particular subject area. For example, for arts and culture this person may be the head of a cultural association or a respected local artist. Bringing these people into the dialogue will help the community tap into their knowledge, resources and network.
- *“Which organizations might have the capacity and resources to implement actions that will arise out of the task force?”* – Once actions are identified, it will not be the sole responsibility of the municipality to implement the actions; rather, it will be the responsibility of the entire community. When selecting task force members, keep in mind local organizations that have the capacity and resources to lead initiatives. For example, the task force may conceive of an education program with students working with their parents on how to conserve water. In this case, it could be the school that takes the lead on the initiative, and the municipality or other organizations that play support roles. When inviting partner organizations onto the

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<sup>11</sup> As many people may want to participate, consider how to handle the possibility of their being more interest in particular task forces than what makes for an appropriate and manageable size. One option could be to have an additional consultation step where the task force consults with a broader group of citizens interested in their community system.





## Appendix 13: Tips on Engaging Task Forces Systems

task force, consider having them sign a formal agreement that they will contribute certain resources to support the implementation of actions.

Consider the example below of possible members for a Task Force for a community's Arts and Culture system:

- **municipal official**
- **someone from a First Nations community**
- **local artist**
- **school**
- **Chamber of Commerce representative**
- **representative of a major/large business**
- **someone from arts council**
- **someone from tourism authority**
- **someone from organizing committee of an annual festival**
- **someone from the local museum**
- **small businesses**
- **someone from the IT industry**
- **a community member employed by the provincial/territorial or federal government**

## Appendix 14: Lessons Learned on Participant Engagement

The following outlines the experience of process leaders from the Resort Municipalities of Whistler's award-winning comprehensive sustainability planning process, Whistler 2020. Although most Canadian communities are very different from Whistler, the experience of the people who led the process provides some insights into the challenges of a participative planning process and how to overcome these challenges. Visit [www.whistler2020.ca](http://www.whistler2020.ca) for more information on Whistler 2020.

### About Whistler 2020

Whistler 2020 – Moving toward a Sustainable Future is Whistler's overarching, community-wide vision and strategic plan for continued success to the year 2020 – an ambitious step on our longer journey to a sustainable future. In terms of structure, Whistler 2020 is divided into two documents or "Volumes". Volume I describes what Whistler aspires to be in the year 2020, including the values, sustainability objectives, vision, priorities and directions that define success and sustainability for our resort community. Volume II outlines how Whistler will achieve the 2020 vision and includes sixteen strategies and related actions that move our community in the right direction, as well as indicators to measure our progress.

Whistler2020 is designed to help our resort community identify and act on opportunities to achieve long-term success in a complex and ever-changing environment. We recognize that the resort community must work hard to generate solutions that are appropriate for today and for the future. We also understand that Whistler requires the collective creativity and leadership of many organizations as well as ongoing courage to take informed risks and to learn from our shared experiences.

The following sections share some of the key lessons that we have learned in leading the development of Whistler2020, and continue to learn as we co-create, update and improve the Whistler2020 process and plan. It is our hope that by sharing these insights, your community will be able to move more quickly along the path to achieving your vision of long-term community sustainability.

Community members, organizations and other key stakeholders widely participated in the Whistler2020 planning process through a range of avenues including open houses, workshops, kids' forums, web-based input, as well as numerous surveys. A number of people were also more directly involved in developing the long-term sustainability plan as participants of the Citizen Advisory Group (approximately 25 people) and of the sixteen strategy Task Forces (approximately 140 people). This section provides key lessons specific to direct engagement in the working committees and task forces, rather than for overall public engagement.

Key Lessons learned along the way include:

- 1) **Clearly and honestly define the purpose and scope of participant engagement upfront.** Communicating a well thought out terms of reference for all stages of engagement is essential to manage participant expectations as well as to ensure participant understanding of the deliverables and how they will contribute to those deliverables. For example, be transparent about the degree of input that the group has – are they an advisory body or a decision-making body?



## Appendix 14: Lessons Learned on Participant Engagement

- 2) **Ensure that leaders of the planning process understand the community and the participant audience.** This is important to design appropriate workshop sessions that inspire and resonate with participants.
- 3) **Ensure that group facilitators are highly skilled to provide a good experience *and* to achieve the required deliverables for the plan in a timely manner.** Leaders of the Whistler process had previous facilitation experience and also engaged in a one-day facilitation training session that was based on Whistler2020 and potential issues that might arise with respect to the workshops.
- 4) **Establish participant trust in the planning process and the relevance of their contributions to the process.** Trust must often be earned through consistent, high-standard and transparent action from the leaders of the planning process. For example, when making changes to draft written materials, provide participants with a ‘tracked changes’ version so that they can understand changes while minimizing their review efforts. As well, provide clear rationale for why certain actions or other task force recommendations will or will not be implemented.
- 5) **Strike the appropriate balance between widespread community input, a critical component of sustainability planning which results in high levels of ownership, and expert involvement, which may lead to a tighter and more focused project.** Potential ways in which both objectives can be achieved include requesting external reviews and recommendations from experts at various stages of the planning process.
- 6) **Invest in necessary participant training, ensuring that the training is perceived to be relevant by the specific strategy area groups.** For example, sustainability planning requires a basic level of understanding of sustainability among participants. In Whistler, we found that customizing the training to specific strategy areas was essential to ensure that participants perceived it to be relevant to their objectives. As well, the training was distributed throughout the four to five workshops that were held with each task force, rather than providing a single in-depth session at the beginning of the process.
- 7) **Make sustainability meaningful to the participants.** Demonstrate the linkages between economic, environmental and social issues (e.g. poor air quality relates to health and liveability and also impacts tourism).
- 8) **Specify and communicate task force participant selection criteria upfront to ensure transparency and credibility.** Ensure that a sufficiently broad range of experts and key stakeholders are represented and that participants from key organizations have decision-making authority and provide appropriate expertise.
- 9) **Invite ‘critics’ to participate in the process where possible.** Individuals who are critical of the sustainability-planning process often add tremendous value by asking key questions, while building their own understanding and ownership. Ensure that these individuals clearly understand the terms of reference.

## Appendix 15: How to Develop a Description of Success

Whatever level of engagement you choose to develop the Descriptions of Success for your key community systems, here are some process suggestions that can help the individuals or groups responsible for their development.

1. Individually or in small groups consider the following questions:
  - **What purpose does this community system serve in a sustainable society?**
  - **What human needs does it help satisfy?**

Record your thoughts and then share them with the rest of the group. As a group synthesize the thoughts into a single statement that expresses the highest aspirations and purpose for your community system in a sustainable society. This statement is akin to a high level long term goal.

2. Think of the kinds of relationships your community system will have with community members and stakeholders in the sustainable future when you have achieved your system's goal. Begin by considering the following question:
  - **In a successful sustainable future, what will our community members and key stakeholders say about this community system?**

This optional warm-up exercise is designed to help you think 'in the future,' as well as focus on what the overarching characteristics of your community's system would be when it is sustainable. Record your thoughts and once you have had enough time to come up with five or six statements, share them with the group.

This is an exercise in imagination and vision. Don't compromise your high level goal because you think it can't be done. Instead, start from a perspective where frequently mentioned barriers have been overcome, e.g. where government policies support sustainable transportation, or where systems are in place to take back used materials.

3. Considering your conversation on stakeholders, **identify five to seven strategic objectives** that answer the following question: *What are the five to seven major strategic objectives that our community system would need to achieve in order to be considered sustainable? You will want to come back to this after completing a*

### The "Secrets" of Success

An effective Description of Success is:

- **Desirable:** Does it appeal to the long-term interests of community members and stakeholders such as businesses, organizations, community groups, employees, customers, owners, and others who have a stake in the community system?
- **Focused:** Is it clear enough to provide guidance in decision making?
- **Flexible:** Is it general enough to allow individual initiative and alternative responses in light of changing conditions?
- **Communicable:** Is it easy to communicate; can it be successfully explained within five minutes?
- **Imaginable:** Does it convey a picture of what the future could look like?
- **Feasible:** Does it comprise realistic, attainable (although challenging) objectives?
- **Describes a sustainable outcome:** Does it address all the organization's key sustainability challenges? Does it support the community's vision?

*Adapted from Kotter, John. 1996. Leading Change. Harvard Business School Press. Boston, Massachusetts. p. 72.*

## Appendix 15: How to Develop a Description of Success

*description of current reality to ensure that the objectives address all of the major sustainability challenges for this community system.*

You may find these questions useful to get started:

- **How could your community system deliver the same services that it does today, but in alignment with the sustainability principles?**
- **Considering the human needs that this system principally satisfies how might this system satisfy other human needs?**
- **What would the facilities, materials, processes, operations, management etc. look like for this community system if it were in alignment with the sustainability principles?**

Individually write down your answers to this question on post-it notes. They will be used later.

Consider writing the objectives with the following in mind:

- Write the objectives in clear, active language;
- Reference a reasonable point in the future;
- Speak about what your community system will look and feel like when you achieve your goal;
- Make it accessible to everyone: avoid jargon; and
- Build on existing strengths — objectives are most powerful when they have a credible foundation. If you create objectives based on current strengths, such as the successes that have already occurred or community initiatives and assets you are proud of, you give people reason to think the objectives can be realized.

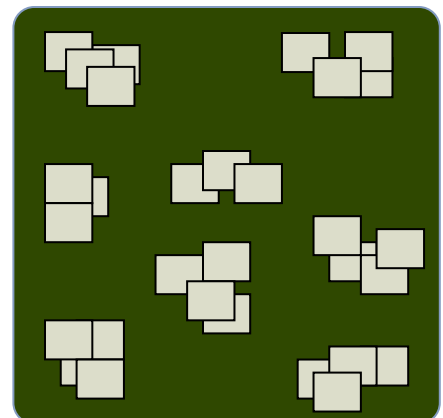
### Hints & Tips

In the process of articulating long-term strategic objectives of a sustainable community system, it is very likely that your group will also identify ideas about the *process* of getting there. For the Description of Success, try to focus on those characteristics that describe a sustainable future state. However, it's a good idea to keep track of the ideas for strategies to get to success (i.e. transition strategies), as they will come in handy later. So, keep a separate list of transition strategies for your community system.

As a group, share your reflections and place your post-it notes on a wall. Arrange the notes to create groupings of common themes that arise. Once everyone has presented, the wall will look something like this:

These objectives constitute the working core of your community system's sustainability goal.

4. Ultimately, your goal and objectives should describe an actual sustainable outcome. To help ensure that they do, you will want to come back to this after completing your Description of Current Reality and **review the key sustainability challenges**. In small groups, reflect on the following questions:
  - Do the strategic objectives address all of the sustainability challenges identified in the sustainability analysis?
  - Have each of your contributions to violations of the sustainability principles, that you described in the sustainability impacts





## Appendix 15: How to Develop a Description of Success

analysis, been eliminated in the future described by your strategic objectives?

If not, adjust your strategic objectives to ensure they will provide the comprehensive guidance that will help move your community's system toward sustainability.

5. Synthesize your findings into a short report that provides the following information:

- Title of community system;
- Goal – a statement of the highest aspirations and purpose for the community system; and
- Objectives –essentially describe the characteristics of the community system when it is aligned with the community system's goal and sustainability principles. These should be written as results based objectives versus prescriptive based objectives. For example, “our community's energy system is fossil fuel free” (results-based) is preferable to “our community's energy system comprises an array of solar panels” (prescriptive).

Lessons learned from practitioners who have developed Descriptions of Success can be found in *Appendix 16: Lessons on Descriptions of Success*. Example Descriptions of Success can be found in Appendix 17 (Williams Lake, B.C.) and Appendix 18 (Whistler, B.C.).



## Appendix 16: Lessons on Descriptions of Success

The following outlines the experience of process leaders from the Resort Municipalities of Whistler's comprehensive planning process, Whistler 2020. Although most communities are different from Whistler, the experience of the people who led the process provides some insights into the challenges of a participative planning process and how to

This section shares some of the key lessons that we have learned in leading the development of Whistler2020, and continue to learn as we co-create, update and improve the Whistler2020 process and plan. It is our hope that by sharing these insights, your community will be able to move more quickly along the path to achieving your vision of long-term community sustainability. To learn more about Whistler 2020, the Resort Municipality of Whistler's comprehensive planning process, see <http://www.whistler2020.ca>.

In Whistler2020, the Description of Success defines what success looks like with respect to specific strategy areas (or community systems) by the year 2020. Task forces developed these statements based on Whistler's sustainability objectives (or sustainability principles) and resort community values to guide actions toward Whistler's short and long-term success and sustainability. Task forces developed draft Description of Success statements for their respective community systems by contributing, reviewing and editing statements until agreement was reached among the group. All sixteen Whistler2020 Descriptions of Success were adopted by Council and are now part Whistler's highest-level municipal policy directions.

Key lessons learned along the way include:

- 1) **Establish and adopt a shared vision that addresses fundamental assumptions on key community systems before creating Descriptions of Success.** Formal agreement on a common vision and/or fundamental assumptions with respect to potentially controversial topics provides boundaries and clear direction for the work of the task forces. For example, Whistler adopted a shared vision of continuing to be a "premier mountain resort community", where economic development always contributes to and is compatible with a tourism economy. This formally adopted vision provided clear notions of future direction, and set boundaries around task force discussions, allowing them to achieve their terms of reference.
- 2) **Establish and adopt a common understanding of sustainability before creating Descriptions of Success.** A common language and framework for describing and evaluating sustainability is absolutely key. Through Council adoption, Whistler committed to using the four Natural Step sustainability principles as the basis of our approach.
- 3) **Provide a clear context and explanation for how the Descriptions of Success are going to be used once completed.** Understanding the Descriptions of Success' prominent roles in the planning process can help to ensure that participants contribute the appropriate level of consideration and attention. For example, Whistler's monitoring primarily measures community-wide performance against the Descriptions of Success, as these are ultimate outcome objectives.
- 4) **Use results-based statements versus prescriptive Description of Success statements.** Prescriptive Description of Success statements are less effective as they tend to reduce flexibility around selecting the best future actions to achieve outcomes. For example, "*transportation options are developed so that inter-community mobility*



## Appendix 16: Lessons on Descriptions of Success

*minimizes the negative impacts of traditional modes of travel” (results-based) is preferable to “rail infrastructure is the preferred means of all corridor travel” (prescriptive). Using indicators or metrics to assess the statements can help the development of results-focused statements.*

- 5) **Develop the Descriptions of Success as a series of concise and non-overlapping bulleted statements, as opposed to a continuous paragraph.** Breaking the Description of Success into statements ensures equal attention to each of the statements, promotes clear and focused thinking, and improves their ability to be used in multiple implementation and decision making formats and tools.
- 6) **Ensure that the Description of Success is a comprehensive reflection of the community’s identified vision and agreed-upon sustainability principles.** Reflecting these important directions in the Descriptions of Success is essential to minimize and avoid conflicting statements across strategies and to promote community-wide ownership. Integrating the highest-level vision and sustainability principles also reduces the need to refer to multiple levels of policy for direction, which can be cumbersome.
- 7) **Share all Descriptions of Success between the various task forces during the creation and refinement phases.** This will help reduce any redundancy between strategy areas and to build understanding and trust among the various participants.
- 8) **Engage external expert advice and input where appropriate.** Allowing for expert advice and commentary on Descriptions of Success increases participant knowledge and provides additional expertise into both visioning scope and potential technical insights. Construct the terms of reference for external input in a manner that provides a useful third party input but also ensures that the task force’s sense of ownership of the product is maintained.



## Appendix 17: Example Description of Success - Williams Lake, B.C.

The following is a sample draft Description of Success from the ICSP process in Williams Lake, B.C. It represents a synthesis of community input via the *Imagine Our Future* initiative about the characteristics of a Williams Lake they want to tell future generations about in 2030 and was drafted for further public consultation. For more information please see [www.imagineourfuture.com](http://www.imagineourfuture.com).



Williams Lake: Imagine Our Future

### Community System: Local Food and Agriculture

Our regional food system is resilient, locally-focussed, healthy and contributes to the overall enjoyment, development and health of our community, its individual members and our local ecosystems. Traditional food areas of First Nations are respected and celebrated.

Food is a crucial bond between communities, individuals and the land in which they are situated. Our challenge is to build an accessible, secure and resilient food system in the region that supplies for our community's needs and health while contributing to the overall health and wellbeing of the local ecosystems and economy.

#### Objectives:

We will be successful when we have achieved the following:

- **Effective use of local knowledge and practices:** Local ecological knowledge and indigenous knowledge is integrated into our overall food strategy and practices for Williams Lake; our food system supports and enables the arts of farming, gardening, foraging, identifying edible and medical plants, cooking, preserving and storing food.
- **Celebrating our local foodstuffs:** Regional food producers, retailers and First Nations traditions are celebrated and supported in the marketplace as valuable components of the region's identity, health, vitality and economic prosperity.
- **Protecting health and environment:** The food system is managed through best practices to enhance biodiversity both of the food system and local ecosystems. Materials, synthetic chemicals and persistent compounds in the food system are proactively managed to protect and promote human and ecosystem health. Water is used effectively and efficiently and does not draw down the overall water capital of the region; water quality is protected throughout all aspects of the food system.
- **Accessibility and economy:** Our food system is diverse, affordable and accessible to all residents of the community; no-one in the Williams Lake community is without dignified access to healthy, nourishing food. Our food system provides farmers with a living wage while enabling all food producers to work in a healthy, safe environment. Our food system provides opportunities for community interaction, enjoyment, employment and development.
- **Protecting the longevity of our food system:** The integrity of plants and seeds are maintained and enhanced for future generations.

## Appendix 18: Example Description of Success – Whistler, B.C.

The following is a sample Description of Success from the ICSP in Whistler, B.C. It represents the output of the Whistler2020 Community Food Strategy task force, which is a broad representation of the regional food expertise and opportunity that exists in the Whistler region. For more information, visit <http://www.whistler2020.ca>.



### Whistler 2020 Strategy Area: Food

**Food is a crucial common bond between cultures, communities and citizens. We are all eaters.** Over the past few generations our shared connection to the food we eat, and the land which nurtures it, has been disconnected through the growth of a giant multinational food system and players that promote convenience and cheap food overall. This system, with global connectivity and shipping infrastructure which circumnavigates the globe, has created a scenario in which food from the other side of the earth is sold as "fresh" in our local stores. Meanwhile, our support for, and connection to, local farmland, farmers and food processors has eroded. Through the development of the Whistler2020 Food Strategy and task force, producers, processors, chefs, restaurateurs, policy developers and other decision-makers are working together to bring our food system closer to home.

With a strong focus on integrating the agricultural history, production capacity and indigenous knowledge in our neighbour communities of Mount Currie and Pemberton, and the immense capacity of Whistler's internationally recognized food service industry, the Food Strategy is a coordinated, collaborative regional effort which will create stronger bonds between food producers, retailers and eaters. Through enhanced food security and the support of our regional partners, our communities will look at food, its delivery and preparation as an integral part of our regional identity and market opportunity. Food actions will create more resilient, self-reliant communities which support all aspects of the local food system from farm to fork.

### Description of Success

In 2020, a co-operative and collaborative community-supported bioregional food system improves the health of communities, the environment and individuals over time, involving a shared effort to build a locally based, self-reliant, secure food system and economy. By this time:

1. All community members have dignified access to sufficient, nutritious, culturally appropriate, safe and affordable food.
2. Regional agricultural land is preserved, enhanced and replenished and encroachment on nature is minimized.
3. Opportunities for food production on both protected farmland and developed lands are encouraged.
4. The food system is managed through best practices to maximize biodiversity.
5. Materials, synthetic chemicals and persistent compounds in the food system are proactively managed to protect and promote human and ecosystem health.
6. Waste from the food system is continually decreasing, what remains is being increasingly diverted from landfills, and material inputs are progressively more sustainable.
7. Water is used efficiently and water quality is protected throughout all aspects of the food system.
8. Energy use and related emissions are being reduced in the food system and are transitioning to renewable energy.
9. Community members continually learn about food, its cycles and the complexity of its social, economic and environmental benefits and impacts.
10. The food system enhances the regional economy, increasing regional jobs and wealth from farm to fork.
11. Regional food producers, retailers and First Nations traditions are celebrated and supported in the marketplace as valuable components of the region's identity, health, vitality and economic prosperity.
12. We hold a shared vision for the food system and works together to achieve that vision and share it with visitors.

# Appendix 19: How to Develop a Description of Current Reality

Whatever level of engagement you choose to develop the Descriptions of Current Reality for your key community systems, here are some process suggestions that can help the individuals or groups responsible for their development. The suggestions are organized based on the three key parts of the Description of Current Reality: sustainability challenges, community assets, and stakeholder analysis.

## Determining Key Sustainability Challenges

1. **Scan your community system via the lens of the four sustainability principles.** The results of this scan should provide answers to these four basic questions:
  - In what ways is our community's (energy, food, transportation, etc...) system currently contributing to systematic increases in concentrations of substances from the earth's crust in nature?
  - In what ways is our community's {energy, food, transportation, etc...} system currently contributing to systematic increases in concentrations of substances produced by society?
  - In what ways is our community's {energy, food, transportation, etc...} system currently contributing to systematic degradation of nature by physical means?
  - In what ways is our community's {energy, food, transportation, etc...} currently system contributing to conditions that undermine people's ability to meet their needs?

### Hints & Tips

Although it can be discouraging to identify and list all of the current impacts of your community's systems, the more full and complete your analysis is, the easier it will be to determine strategic priorities and come up with ideas for action. Generating these ideas (Action Planning) is the other side of the coin – it's a creative and energizing process.

To help you with this part of the analysis, a series of questions has been provided in *Appendix 20: Guiding Questions for the Four Sustainability Principles* that will help you analyze how this community system is currently contributing to unsustainability.

### Hints & Tips

Determine significance as a team. This will help ensure that a full range of opinions and perspectives are explored. Apply this assessment of significance as you do the sustainability principles scan. It is better to assess significance throughout the process than to leave it to the end.

2. **Determine the significance of each impact.** As you go through the scan, you will likely find a large number of impacts. To help you focus on the critical impacts of your community system, perform a quick analysis on those which you consider to be the most significant from a sustainability perspective. There is no science to identifying 'significance', but below are some criteria that may help you in your assessment:

# Appendix 19: How to Develop a Description of Current Reality

An impact is more significant if:

- the relative size of the item in the budget is large (vs. small); and
- is used in large volumes (vs. small volumes);
- it can easily lead to a violation of the sustainability principles. For example, if the substance / product in question:
  - generally exists in low concentrations in nature, e.g. trace metals, complex chemical compounds (vs. high concentrations in nature such as silica);
  - is persistent, e.g. chemical compounds that don't break down easily (vs. those that breakdown easily into substances that nature can reuse);
  - is used in a dispersive manner (vs. being kept in tight technical cycles);
  - relies on mining, poor forestry practices, etc. (vs. restorative practices); and
  - relies on or leads to poor labour practices, unsafe working conditions, excessively low wages, oppressive governments, etc. (vs. safe working conditions, appropriate wages, etc.).

Use the matrix box below to help analyze the significance of the sustainability impacts.

		← Importance for the Community	
		High Cost/Revenue/Volume	Low Cost/Revenue/Volume
Degree of Violation of Sustainability Principles	Major violation	<b>Box A</b> Impacts that are serious violations of sustainability principles AND which are essential to the functioning of the community system  <i>Community needs to ensure that these issues are taken into consideration in plans and strategies. A successful sustainability initiative will require a serious effort to address these impacts.</i>	<b>Box B</b> Impacts that result in serious violations of sustainability principles BUT which are less essential to the functioning of this stage of the community system  <i>Community needs to ensure that these issues are taken into consideration in plans and strategies.</i>
	Minor violation	<b>Box C</b> Impacts that are minor violations of sustainability principles BUT which are essential to the functioning of the community system  <i>They may be a source of risk; and community will want to explore means of monitoring and managing that risk.</i>	<b>Box D</b> Impacts that result in minor violations of sustainability principles AND that are less essential to the functioning of the community system  <i>They may require limited monitoring or informing of progress but are of low priority. They are unlikely to be the subject of strategies and actions.</i>

Again, there is no exact science to determining which of your community system's impacts are most significant. The goal is to identify the impacts with the greatest potential to contribute to violations of the four sustainability principles and the greatest relevance to your community. As your team becomes more familiar with the principles, this will become easier.

## Appendix 19: How to Develop a Description of Current Reality

3. **Synthesize the results of your scan into key sustainability challenges.** Having a set of five to seven clearly defined challenges that your community's system must meet in order to achieve full sustainability will be very useful to help further develop your description of success and when you generate ideas that will move your community's system toward its vision (during the "Determining Strategies and Initiatives to Bridge the Gap" phase later in the process).

Aim for five to seven groupings of key sustainability challenges. If you have too many, they may begin to lose their significance and become difficult to operationalize, and too few may mean you have missed some major, overarching challenges. You should aim for something along the lines of the example below (note: although this example is for an organization rather than a community system it provides an excellent presentation of 5 – 7 key sustainability challenges).

### Landmark Group of Builders – Key Sustainability Challenges

The Landmark Group of Builders (LGB) is a homebuilding and real estate development company with operations in Edmonton, Red Deer and Calgary Alberta, Canada. As part of its baseline analysis, LGB developed the following list of key sustainability challenges:

1. We are highly dependent on the degradation of ecologically and agriculturally productive land through development.
2. We are highly dependent on the dispersive use of hydrocarbons as fuel and raw material.
3. We are dependent on an economic and physical system that systematically converts virgin material into unusable waste in both the short and long term.
4. We are dependent on materials that have toxic effects in the ecosystem and organisms.
5. We support and are dependent on an unsustainable supply chain.

4. **Draft a short report of the key challenges** with the more detailed scan as an appendix. For each key sustainability challenge provide the following information:
  - o Title of key challenge
  - o Rationale about why the team feels that it is a key challenge. This should be about one paragraph that explains what the challenge is and why you feel it is important to consider.

## Determining Community Assets

1. **Identify key assets that can be leveraged** as items to build on top of or coordinate with throughout your sustainability journey. Using the questions listed in *Appendix 21: Guiding Questions for Assets Inventory*, brainstorm a list of assets that your community and the community system possess and that will aid its journey toward full sustainability.

# Appendix 19: How to Develop a Description of Current Reality

These programs can be formal or informal. At this stage, the most important part is simply creating a list. Note that aspects of this inventory may overlap with the sustainability impacts (noted above) or the stakeholder analysis (that comes later). This is fine.

2. Once you have a good list of assets, **consider organizing your list** to see which can be best leveraged and where you might have gaps to fill. You may find overlap. This is okay. As a general rule of thumb, assets are considered high-leverage if they:
  - already have buy-in and community support;
  - are a consistent part of how your community does business;
  - provide support for a clear transition away from significant use of i) materials from the earth's crust; ii) scarce, toxic or persistent chemicals and compounds; iii) materials or processes that contribute to systematic degradation of nature by physical means; iv) materials or processes that undermine people's ability to meet their own needs; and
  - provide support for creating strategic partnerships internally or externally (to the community) that can aid in your community's overall journey toward sustainability.

You will use the assets inventory when you reach the action planning stage. The inventory will help you determine: i) what initiatives and actions are already in place that are helping your community system overcome its key challenges and work toward its description of success, and ii) where gaps exist in those initiatives that need filling.

3. **Synthesize the results of your assets inventory** into a short report that answers the following questions:
  - What assets have you identified from your analysis?
  - How can your community use these assets in its sustainability initiative?
  - What assets do you feel are missing and would be good to create based on your analysis?

## Stakeholder Analysis

1. **Brainstorm a set of stakeholders** by going through the following questions:
  - Who in this community system stands to lose or gain significantly from the ICSP?
  - Whose actions could potentially affect the ability of the community to achieve success in this community system?

Don't worry if your list is long; you will be prioritizing the stakeholders afterwards to make this list more manageable.

2. Once you have a comprehensive list of stakeholders, use the matrix below (Page 95) to **analyze the importance of key stakeholders** to your community system's sustainability initiative by placing stakeholders into the appropriate boxes.

### Hints & Tips

Make sure as many people from your community as possible have an opportunity to contribute to the brainstorming process. Many voices and diverse perspectives make for a richer dialogue.

# Appendix 19: How to Develop a Description of Current Reality

		Degree of Influence	
		High Influence	Low Influence
Degree of Importance of ICSP to Stakeholder	High Importance	<b>Box A</b> Stakeholders who stand to lose or gain significantly from the ICSP AND whose actions can affect the ability of the community to achieve success in this community system  <i>Community needs to ensure that their interests are taken into consideration in plans and strategies. Overall impact of the project will require good relationships to be developed with these stakeholders.</i>	<b>Box B</b> Stakeholders who stand to lose or gain significantly from the ICSP BUT whose actions cannot affect the ability of the community to achieve success in this community system  <i>Community needs to ensure that their interests are taken into consideration in plans and strategies.</i>
	Low Importance	<b>Box C</b> Stakeholders whose actions can affect the community's ability to achieve success in this community system BUT who do not stand to lose or gain much from the ICSP  <i>They may be a source of risk; and you will need to explore means of monitoring and managing that risk.</i>	<b>Box D</b> Stakeholders who do not stand to lose or gain much from the ICSP AND whose actions cannot affect the ability of the community to achieve success in this community system  <i>They may require limited monitoring or informing of progress but are of low priority. They are unlikely to be the subject of strategies and actions.</i>

**3. For each of the stakeholders in Box A, B, and C, write down a few points in answer to these questions:**

- How does the stakeholder stand to gain or lose from your community system's sustainability initiative?
- How can the stakeholder influence the success of your community system's sustainability initiative? Both positively (+) and negatively (-).
  - What determined their ability to influence your community system's success? How do we know how much that influence matters?
  - What is their strength?
  - Which influences can be altered? Which cannot?
  - Which influences can be altered quickly? Which ones only slowly?
  - Which influences, if altered, would produce rapid change?
  - What skills and/or information are needed and available to influence stakeholders?

Feel free to explore different criteria to approach the question of most important stakeholder relationships.

**4. Synthesize the results of your stakeholder analysis into a short report** that answers the following points:

- Which stakeholders are in Box A? Provide your explanation about why.
- Which stakeholders are in Box B? Provide your explanation about why.
- Which stakeholders are in Box C? Provide your explanation about why.
- Ideas you have about how to work with key stakeholders, in particular those in Box A.

### Hints & Tips

Try not to be too general when listing stakeholders. For example, rather than listing a generic category like 'the media', try to identify sub-groups, or even specify who the key media players are.

# Appendix 20: Guiding Questions for the Four Sustainability Principles

## Sustainability Principle #1



**To create a sustainable society, we must reduce and ultimately eliminate our contribution to the progressive buildup of substances extracted from the earth's crust.**

The fundamental current reality question with the first sustainability principle is “**how is your community system contributing to the systematic accumulation in nature of substances extracted from the earth's crust?**” In order to answer this fundamental question, consider the following guiding questions:

**1a) Does your community system rely on processes that use trace metals and minerals (e.g. mercury in electronics, cadmium in batteries or paint-dyes, etc...)? What ultimately happens to these metals and minerals?**

**Rationale:** Trace metals exist in low concentrations in nature, and therefore even if a small amount gets into nature, their concentration can increase very quickly. Trace metals can enter nature by leakages during the mining or production process, dissipative uses of products that contain trace metals (e.g. paints) and/or disposal of products that contain trace metals (e.g. electronics and batteries to landfill/incineration).

**1b) Does your community system rely on fossil fuel based energy for operations (e.g. coal-fired electricity, gas-fired electricity, gas for heating, etc...)?**

**Rationale:** When fossil fuels are combusted for energy, substances such as carbon dioxide and sulfur oxides are formed and released into the atmosphere. These substances accumulate and increase in concentration. This increase in concentration leads to problems such as climate change, poor air quality, and acid rain.

**1c) Does your community system rely on fossil-fuel based transportation to move people and things (e.g. vehicle fleets, flights for visitors, commuting of employees, collection of garbage, transport of products and supplies)?**

**Rationale:** The vast majority of transportation modes today use fossil fuels such as diesel and gasoline. When fossil fuels are combusted for energy, substances such as carbon dioxide and sulfur oxides are formed and released into the atmosphere. These substances accumulate and increase in concentration. This increase in concentration leads to problems such as climate change, poor air quality, and acid rain.

While every community system is likely contributing to flows that create problems with respect to this principle, your community system may also have implemented practices or programs that reduce your contributions or even offer products or services that reduce others' contributions. So, it is also important to take stock of any strengths that your community system may already have in reducing its contributions. To do so, consider the following questions:

**1d) Does your community system have any practices or programs in place internally that reduce energy use and/or flows of trace metals or minerals?**

**1e) Does your community system offer any products or services that reduce energy use and/or flows of trace metals or minerals for others?**



# Appendix 20: Guiding Questions for the Four Sustainability Principles

## Sustainability Principle #2



**To create a sustainable society, we must reduce and ultimately eliminate our contribution to the progressive build-up of substances produced by society.**

The fundamental current reality question related to the second sustainability principle is: **how is your community system contributing to the accumulation in nature of substances produced by society?** In order to answer this fundamental question, consider the following guiding questions:

**2a) Does your community system use or produce synthetic substances that contain persistent compounds (e.g. PVC in piping, volatile organic compounds in cleaners, paints and adhesives, CFCs in refrigerants, brominated fire-retardants in electronics and furniture, etc...) and/or natural substances but in volumes much greater than natural flows (e.g. carbon dioxide, nitrogen oxides, etc...)?**

**Rationale:** The appearance of these substances in products means that they must be used and disposed of in a manner that does not allow them to leak into nature. For example, they may leak into nature through dissipative uses (e.g. off-gassing paints, aerosol sprays, storm water run-off, etc), landfills or incineration. If they leak, persistent compounds will accumulate and, eventually, reach a toxic or harmful threshold. For example, although CFCs were considered a “miracle” substance when they were invented, due to their complex nature, they were not broken down easily and accumulated in the earth’s atmosphere. As a consequence of this accumulation, CFCs interacted with ozone and began to break down the ozone layer.

**2b) Does your community system rely on production processes that use synthetic substances that contain persistent compounds (e.g. dioxins or furans in the pulp and paper process)?**

**Rationale:** The use of these substances during production processes means that there is a risk that they will leak into nature, either through accidental spills or production processes that allow them to leak (e.g. carried out through effluent water). As these substances dissipate in nature, they will accumulate in concentration and eventually reach a toxic or harmful threshold.

While every community system is likely contributing to flows that create problems with respect to this sustainability principle, your community system may also have implemented practices or programs that reduce your contributions or even offer products or services that reduce others’ contributions. Therefore, it is also important to take stock of any strengths that your community system may already have in reducing or eliminating its contributions. To do so, consider the following questions:

**2c) Does your community system have any practices or programs in place internally that reduce flows of persistent compounds?**

**2d) Does your community system offer any products or services that reduce flows of persistent compounds for others?**

# Appendix 20: Guiding Questions for the Four Sustainability Principles

## Sustainability Principle #3



**To create a sustainable society, we must reduce and ultimately eliminate our contribution to the systematic physical degradation of nature.**

The third sustainability principle addresses the direct degradation and modification of the biosphere, and, consequently, the physical effect society has on the services nature provides to society (such as clean air, clean water, quality topsoil, etc...). The fundamental current reality question related to the third sustainability principle is: **how is your community system contributing to the physical degradation of nature?** In order to answer this fundamental question, consider the following guiding questions:

**3a) Does your community system use or produce food and fibre from unsustainably harvested renewable resources<sup>4</sup> (e.g. lumber from non-certified forests, food from farming practices that result in loss of biodiversity and topsoil)?**

**Rationale:** A dependence on food and fibre procured from unsustainably harvested renewable resources results in the physical degradation of nature. This physical degradation can take the form of modifying areas of relatively high biodiversity into monocultures and/or over-harvesting (e.g. clear-cutting, over-fishing).

**3b) Does your community system rely on processes that require continuous direct encroachment into natural areas (e.g. urban design practices that result in urban sprawl)?**

**Rationale:** A dependence on more and more encroachment into natural areas results in more and more loss of productive ecosystems.

**3c) Does your community system rely on processes that introduce foreign and invasive species into an ecosystem?**

**Rationale:** The biodiversity and productivity of an ecosystem can be degraded if an invasive species is introduced, causing more common local species to die off.

**3d) Does your community system rely on processes that modify ecosystems in such a way as to reduce their biodiversity and productivity? (e.g. clearing land for monocultures)**

**Rationale:** The biodiversity and productivity of an ecosystem can be degraded if it is modified from its natural state, for example, if certain species are physically removed in favour of other species.

**3e) Does your community system rely on products or processes that use mined metals, minerals or fossil fuels (e.g. virgin metals, virgin plastics)?**

## Appendix 20: Guiding Questions for the Four Sustainability Principles

**Rationale:** A dependence on virgin metals and petrochemicals means a systemic dependence on mining (i.e. mining will never stop as long as we depend on it), which can result in the direct physical degradation of nature, especially in cases where the proper reclamation of land is not performed.

**3f) Does your community system rely on landfills to manage waste and/or as the ultimate fate of its products?**

**Rationale:** A dependence on landfills to manage waste will result in more and more landfills needing to be created. The increasing amounts of land required for this purpose represents in a systematic physical encroachment into nature.

**3g) Does your community system rely on processes that use water? Is the draw on water systems larger than the natural flow in the watershed where the water is sourced?**

**Rationale:** If water is drawn at a rate that is faster than it is replenished, there is a systematic decline and an associated degradation of related ecosystems.

While every community system is likely contributing to flows that create problems with respect to this sustainability principle, your community system may also have implemented practices or programs that reduce your contributions or even offer products or services that reduce others' contributions. Therefore, it is also important to take stock of any strengths that your community system may already have in reducing or eliminating its contributions. To do so, consider the following questions:

**3h) Does your community system have any practices or programs in place internally that reduce the physical degradation of nature?**

**3i) Does your community system offer any products that reduce the physical degradation of nature by others?**

### Sustainability Principle #4



**To create a sustainable society, we must reduce and ultimately eliminate our contribution to conditions that undermine people's capacity to meet their basic human needs.**

The fundamental current reality question related to the fourth sustainability principle is: **how is your community system contributing to conditions that undermine people's ability to meet their needs?** In order to answer this fundamental question, consider the following guiding questions:

**4a) Does your community system rely on inputs that come from regions or companies where authorities create obstacles for people to meet their needs? Does your community system have any practices itself that do so?**

## Appendix 20: Guiding Questions for the Four Sustainability Principles

**Rationale:** People can be restricted from meeting their needs by authorities. Examples include: (i) prohibiting people from organizing themselves in unions; (ii) punishments and humiliating treatment; (iii) enforced labour; and (iv) discrimination.

**4b) Does your community system rely on processes that create economic conditions that hinder people from meeting their needs?**

**Rationale:** Individuals require economic resources to meet many of their most fundamental needs. Community systems can purposefully or inadvertently reinforce practices and systems that limit or restrict peoples' economic ability to meet their needs. Examples include: (i) child labour; (ii) low salaries; (iii) neglecting to pay social costs – such as education, health care, etc – for employees in local communities in developing countries or indigenous communities; (iv) wasting resources.

**4c) Does your community system rely on processes with unsafe and unhealthy work environments and/or that contribute to unsafe and unhealthy living environments for people in local communities?**

**Rationale:** People lose the capacity to meet their needs if their working or living conditions are unhealthy. Examples include (i) overly long working hours; (ii) workplace hazards such as chemical exposure and accidents; (iii) local water and air pollution.

While every community system is likely contributing to flows that create problems with respect to this sustainability principle, your community system may also have implemented practices or programs that reduce your contributions or even offer products or services that reduce others' contributions. Therefore, it is also important to take stock of any strengths that your community system may already have in reducing or eliminating its contributions. To do so, consider the following questions:

**4d) Does your community system have any programs in place internally that reduce or eliminate barriers to people meeting their needs?**

**4e) Does your community system offer any products or services that reduce or eliminate barriers to people meeting their needs.**



## Appendix 21: Guiding Questions for Assets Inventory

The following questions can help guide your assessment of the assets that exist in your community to help efforts to move toward your Description of Success for the community system in focus.

1. What programs, structures, policies or initiatives does your community have in place to **raise general awareness** about sustainability-related issues in this community system with its stakeholders (e.g. municipal staff)?
2. What programs, initiatives, structures or policies does your community system have in place to **engage with stakeholders** to address common sustainability-related challenges?
3. Does your community have any policies, structures or programs in place that support its stakeholders (e.g. citizens) to **make more sustainable choices** in this community system? For example, can citizens choose between more sustainable services or less sustainable services?
4. Does your community have in place any policies, structures or programs wherein it takes full **responsibility for the materials** in this community system from design and development to end of life / demolition?
5. Does your community have any policies, structures or programs in place that help it to **identify where it uses** virgin-mined materials, fossil fuels or rare and scarce metals in this community system? Are materials monitored and cared for through proper recycling or closed-loop systems? If so, are there programs or policies in place to support transition away from these materials or practices toward more benign ones that do not accumulate in nature?
6. Does your community have any policies, structures or programs in place that help it to **identify toxic or persistent materials** in this community system? Are materials monitored and cared for through proper recycling or closed-loop systems? If so, are there programs or policies in place to support transition away from these materials or practices toward more benign ones that do not accumulate in nature?
7. Does your community have any policies, structures or programs in place that help it identify what **materials or practices may contribute to systematic degradation of nature** by physical means in this community system? If so, are there programs or policies in place to support transition away from these materials or practices?
8. Does your community have any policies, structures or programs in place that help it identify what **materials, policies or practices may contribute to undermining people's ability to meet their own needs** in this community system? If so, are there programs or policies in place to support transition away from these?



## Appendix 22: Lessons on Descriptions of Current Reality

The following outlines the experience of process leaders from the Resort Municipality of Whistler's award-winning comprehensive planning process, Whistler 2020. Although most communities are different from Whistler, the experience of the people who lead the process provides some insights into the challenges of a participative planning process and how to overcome these challenges.

This section shares some of the key lessons that we have learned in leading the development of Whistler2020, and continue to learn as we co-create, update and improve the Whistler2020 process and plan. It is our hope that by sharing these insights, your community will be able to move more quickly along the path to achieving your vision of long-term community sustainability. To learn more about Whistler 2020, the Resort Municipality of Whistler's comprehensive planning process, see [www.whistler.ca](http://www.whistler.ca).

In Whistler2020, the Current Reality descriptions provide an overview of strategy area specific situations in Whistler *today*, and attempts to highlight the key challenges and gaps between '**Where we are**' today and '**Where we're going**' in the future (Description of Success, see Appendix 15). Understanding this baseline provided the Task Forces with a starting point for identifying informed actions capable of moving our community toward our vision.

Key Lessons learned along the way include:

- 1) Be honest, and don't forget to highlight your community's successes and accomplishments in addition to challenge areas or shortcomings.**
- 2) Don't let the Current Reality section overwhelm the entire process or document.** Strategy development Task Forces need to understand 'where the community is...' primarily to as a means to empower the group to develop informed actions. Resist the tendency to create an extensive 'state-of-the-community report', instead concentrate on understanding priority gaps relative to a well articulated vision and sustainability objectives, and on creating and prioritizing strategic actions.
- 3) Use tools such as 'Key Opportunities', 'Executive Summaries' and separate 'Appendices' to communicate the majority of Current Reality data.** As excessively long planning documents generally are not read by a majority of the community, produce final products that are accessible, concise and engaging to large audiences.
- 4) Present Current Reality information in a framework that is consistent with the Description of Success content.** A common structure is important to enable participants to see direct linkages between: the vision (ultimate objectives), the current reality (opportunity areas), and proposed actions (that address opportunity areas).
- 5) Present Current Reality information with appropriate and comprehensive referencing.** The Current Reality information has the capacity to become a useful baseline resource for staff and the community alike. To promote and facilitate such everyday use of your document, ensure that full referencing is included throughout this section. Referencing builds credibility and also ensures that intellectual property and community input is valued and respected.



## Appendix 22: Lessons on Descriptions of Current Reality

- 6) **When additional research is required to develop the Current Reality (and it will be) direct this intention toward the 'Action Development' phase.** The Current Reality is fundamentally a review of existing literature and resources. Keep track of desirable yet missing datasets or information and re-channel the thought into an action for future improvement of the Current Reality. For example, Whistler's Economic task force prioritized an action to assess the current and future retail/commercial mix in Whistler.
- 7) **Ensure that community system-specific financial information and current budget resources are included as baseline data as is possible.** Failure to do so may lead to inappropriate action planning, as well as unrealistic participant expectations and thus scepticism in the ability of the process to access appropriate financial resources for implementation.
- 8) **Design your process to ensure each task force member has the inclination, time and ability to understand and internalize the Current Reality content.** Effective action development and prioritization is fundamentally premised on all task force members being familiar and comfortable with the information contained within the Current Reality. As such, failure to achieve this understanding can compromise the final products.

## Appendix 23: Example Description of Current Reality – Williams Lake, B.C.

The following is a sample draft Description of Current Reality from the ICSP process in Williams Lake, B.C. It represents a synthesis of community input via the *Imagine Our Future* initiative about community assets, as well as a review of community documents, conversations with local experts, and review of materials from leading community planning organizations. It is meant to give a snapshot of where the community is at to inform a discussion of the transition from current reality to success. It was drafted for further public consultation. For more information please see [www.imagineourfuture.com](http://www.imagineourfuture.com).



Williams Lake: Imagine Our Future

### Community System: Local Food and Agriculture

Support of locally produced and processed food has declined on a global scale over the years. This is concurrent with an increase in the average ‘footprint’<sup>12</sup> of everyday foodstuffs which travel around the world, contributing to increases in greenhouse gas emissions and so forth. Connection to the food we eat and the land that produces it has eroded. The current food system in Williams Lake depends on a high percentage of imported, non-local foodstuffs. Local food production is part of the traditional community of Williams Lake, particularly for the First Nations and the ranching and pioneering traditions of raising and/or hunting meat and preserving food, however it is not typically celebrated or sold in major grocery stores. Local First Nations have a history of collecting their own food from the land at a rate complementary to regeneration by natural systems and hold much of the traditional ecological knowledge (TEK) of the area.

### Assets

Below is a list of community assets that have been identified from community input that we can build on to achieve our Description of Success:

- **Local wisdom:** Tradition of foraging, growing, preserving, farming, ranching food in the area. TEK and First Nations knowledge of local food stuffs, climate and soil types.
- **Community resources:** Local beef production. Existing Farmer’s Market;

Please share any information you have that would help us build a more complete picture of current reality.

What other relevant assets does Williams Lake have? These could be physical assets, networks, initiatives, etc.

<sup>12</sup> In this case, ‘footprint’ refers to the total social and environmental impact that a foodstuff has over the course of its life cycle through farming, production, transportation, use and end of life. Impacts may include associated water use (‘water footprint’); associated greenhouse gas emissions and so forth.



## Appendix 23: Example Description of Current Reality – Williams Lake, B.C.

local food policy committee with a strong and committed presence; existing community garden network.

Through community input, review of documents and conversations with experts, we have identified the following issues to attaining our Description of Success:

- **Non-local food dependency:** There is a high dependence on imported food; many local ranchers cannot sell their beef locally and have to export it.
- **Unequal access to food:** There are homeless people going hungry in Williams Lake and area and the local food bank does not distribute fresh, nourishing food to the degree to which it could if local food were involved.
- **Development pressure:** There is encroachment of development onto agriculturally productive land and traditional First Nations hunting, fishing and foraging grounds.
- **Lack of alignment to address food system:** Lack of coordinated movement around local food production. There is a lack of fully comprehensive community knowledge regarding most agriculturally productive or potentially productive lands and there is no capital budget allocated to local food infrastructure within City limits.

### Existing Williams Lake Indicators

To track progress towards success, we have found the following community indicators:

The Fraser Basin Council monitors various indicators of community sustainability in communities located within the Fraser watershed region (the Fraser Basin). Select indicators are available for Williams Lake, including:

- Amount of land dedicated to Agricultural Land Reserve (ALR) status.

What other relevant issues do you feel should be on this list?

What other indicators are you aware of that may help us measure and report on our progress?

## Appendix 24: How to Select Performance Indicators and Targets

Community sustainability indicators are a huge topic, and it is easy to get bogged down working on indicators. Here are some process suggestions that can help the individuals or groups responsible for the selection of indicators and targets for community systems.

1. For each of the strategic objective in your Description of Success, ask yourself “how will we know if we have achieved that objective and/or are making progress toward it?” Reflecting on this question will help you **identify and design indicators** that will measure and monitor the success of your community system in reaching its goal and objectives. The specific indicators will vary depending on the objectives, but they are usually used to assess your progress over a long period of time and will ultimately communicate alignment with the sustainability principles.

The acronym ‘SMART’ is often used as a tool when choosing performance indicators because effective indicators are:

- Specific
- Measurable/Motivational
- Aggressive yet Attainable
- Relevant
- Time-bound

For example, because most communities rely on fossil fuels for energy and transportation and because our combustion of fossil fuels produces greenhouse gases (which relates to the first two sustainability principles), the level of a community’s greenhouse gas emissions over time is a common performance indicator.

At this stage, it may be useful to start with indicators that are both relevant to the goal and that are already being tracked within your community. It may also be useful to look at what indicators other communities are tracking. The data gathering mechanisms you already have in place can provide a foundation upon which to build up more detailed measurement systems over time. Either way, it’s important to have some relevant indicators that will help ease some of the possible barriers to integrating changes toward sustainability, rather than waiting for an ideal tracking program to be in place.

2. **Determine targets for each performance indicator.** Use the following criteria to help set realistic yet ambitious targets:

### Good Targets

- provide direction;
- set clear expectations;
- provide opportunities for a win;
- create motivation; and
- are proactive.

### Targets are likely to fail if:

- they are too ambitious or unrealistic;
- there is a lack of commitment or ownership;
- they are not recorded;
- progress is not reviewed regularly in comparison to the target; and
- there is no action plan to achieve the target.

## Appendix 24: How to Select Performance Indicators and Targets

For the performance indicator of greenhouse gas emissions, the target could be a certain percentage reduction by a certain time.

For example, a community might decide to reduce its total greenhouse gas emissions by 50 per cent by the year 2020, using the greenhouse gases emitted in 2000 as a base measurement. It should be noted that targets are usually interim levels of performance on the long-term journey to sustainability. If the organization above achieves its target of a 50 per cent reduction in greenhouse gas emissions, it has made significant progress on its journey to sustainability, but it is not yet fully aligned with sustainability principles because it has not yet eliminated its dependence on fossil fuels and/or achieved carbon neutrality.

3. **Create a system to track and monitor performance.** There are a number of tools and approaches that can help a community track and monitor performance in their selected indicators, each with different budget and resource implications. Whether the system chosen is simple or sophisticated, the key is to ensure that the data is being tracked in one centralized system that can be used for periodic reporting.

The creation of the monitoring system, however, can come after the action plan has been developed. In fact, developing the system might even be one of the actions identified in the action planning tasks described below.

### Going Deeper

The **Global Reporting Initiative** is an international, multi-stakeholder initiative aimed at creating a common global framework for voluntary sustainability reporting. It is a widely used framework for reporting in the corporate sector, and its website has a wide array of commonly used indicators that organizations can choose from. Many of these may be relevant for community systems. For more, see <http://www.globalreporting.org>.

### Sustainable Cities Ranking

Municipalities are taking an ever-increasing role in promoting sustainability within their communities. The 2009 Sustainable Cities Rankings developed by Corporate Knights Magazine judged the relative sustainability of 17 small, medium and large cities across Canada.

An advisory board, led by The Natural Step, helped Corporate Knights to identify areas where it could make its methodology more robust by suggesting an improved approach and new metrics to better evaluate a city's strengths and weaknesses.

Cities were assessed in five categories: Ecological Integrity, Economic Security, Governance and Empowerment, Infrastructure and Built Environment, and Social Well-Being. Publicly available information, including Statistics Canada data, and a city survey conducted by Corporate Knights were used to determine city scores.

The 2009 results were:

**Most sustainable large city:** Edmonton, AB

**Most sustainable medium city:** Halifax, NS

**Most sustainable small city:** Yellowknife, NT

The full results of the ranking, including the surveys completed by each city, are available on [www.corporateknights.ca](http://www.corporateknights.ca).

# Appendix 25: Opportunities for Action

Two strategies for making better use of our resources are to 1) reduce the amount of material or energy used to produce a given product, called dematerialization, and 2) substitute one material or activity for another, called substitution. Both strategies are illustrated in the following table. The examples in each column correspond to the sustainability principle at the top of the column.

**Dematerialization:** By reducing the amount of material or energy used to produce a given product or service, we can both increase the productivity of each unit of a given resource (as when we produce, say, a paper cup with less paper) and decrease the amount of waste (there is less paper to be disposed of when we finish with the cup). As a special sustainability principle 4 consideration, dematerialization can free up resources, thus permitting a more equal distribution of those resources among our global society.

<p><b>Sustainability Principle #1</b> Eliminate our contribution to the progressive buildup of concentrations of materials extracted from the earth's crust</p>	<p><b>a. Increase resource productivity of inputs</b> e.g. turn off lights &amp; computers when not in use and where fossil fuels are the main energy source</p> <p><b>b. Create less waste output</b> e.g. recycled batteries (close the loop)</p>
<p><b>Sustainability Principle #2</b> Eliminate our contribution to the progressive buildup of concentrations of chemicals and compounds produced by society</p>	<p><b>a. Increase resource productivity of inputs</b> e.g. reduce frequency of chemical application</p> <p><b>b. Create less waste output</b> e.g. Dupont's "Petretec" process can indefinitely recycle throw-away polyester film into new film with the same quality as that made from virgin materials but costing 25% less</p>
<p><b>Sustainability Principle #3</b> Eliminate our contribution to the progressive physical degradation and destruction of nature and natural processes</p>	<p><b>a. Increase resource productivity of inputs</b> e.g. use recycled wood for construction, design furniture with less wood</p> <p><b>b. Create less waste output</b> e.g. In Alberta, Bow Valley Bio-diesel is re-using restaurants' waste vegetable fryer oil to provide customers with fuel. By finding a new use for the fryer oil, they are reducing waste that would otherwise be sent to landfills.</p>
<p><b>Sustainability Principle #4</b> Eliminate our contribution to conditions that undermine people's capacity to meet their basic human needs</p>	<p><b>a. Increase resource productivity of inputs</b> e.g. actions to improve energy efficiency saves resources for other needs</p> <p><b>b. Create less waste output</b> e.g. recycling saves resources for other needs</p>

# Appendix 25: Opportunities for Action

**Substitution:** refers to switching one type of material, energy or process used in the production of a given product or service to another that has fewer negative environmental and social impacts. Examples include switching from fossil fuels to renewable energy; switching from scarce metals that can accumulate quickly in nature to more abundant metals that accumulate slowly; and switching from synthetic chemicals that don't break down for long periods of time to natural substances that break down easily in nature.

## Sustainability Principle #1

Eliminate our contribution to the progressive build-up of concentrations of materials extracted from the earth's crust

**a. Use more abundant materials from the earth's crust (vs. scarce materials)**

e.g. Matsushita striving to eliminate its use of chromium, cadmium and lead in the design of TVs and increase its use of magnesium as a substitute

**b. Use renewable materials that avoid mining from the earth's crust**

e.g. purchase renewable energy wherever the regular source is fossil fuels

## Sustainability Principle #2

Eliminate our contribution to the progressive build-up of concentrations of chemicals and compounds produced by society

**a. Use human-made substances that degrade naturally into compounds that do not increase in concentration in the biosphere**

e.g. Interface, Inc. developing its "biodegradable carpet"

**b. Use materials that avoid chemicals and compounds foreign to nature altogether**

e.g. replace regular cleaning products with natural cleaners

## Sustainability Principle #3

Eliminate our contribution to the progressive physical degradation and destruction of nature and natural processes

**a. Use less land area to deliver similar or greater value**

e.g. designing and building denser developments to avoid urban sprawl

**b. Change practices/suppliers to those that create better management routines that do not degrade productive ecosystems by physical means**

e.g. purchase wood that is certified by the Forest Stewardship Council

## Sustainability Principle #4

Eliminate our contribution to conditions that undermine people's capacity to meet their basic human needs

**a. Change focus from commodity to service to find completely new ways of meeting the same human need with less material and energy**

e.g. using passive solar energy to replace natural gas or electricity for heating

**b. Change practices/suppliers to those that do not create or support political, economic or social barriers that keep people from meeting their needs**

e.g. purchase "fair-trade" certified coffee

## Appendix 26: Sources for Innovative Actions

The following are a sampling of resources for examples and best practices in sustainable community initiatives. This is not an exhaustive list – but, rather, a list of resources to get you started as you brainstorm possible actions in key community systems.

- **Federation of Canadian Municipalities Center for Sustainable Community Development.** The Centre encourages municipal governments to improve their environmental performance and to enhance quality of life for Canadians through sustainable community development. The Centre's programs provide financial support and build capacity for Canadian municipalities to reduce greenhouse gas emissions and improve the quality of our air, soil and water. The Centre's website contains profiles of the numerous community projects that have received Green Municipal Funding over almost 10 years. Available at <http://www.fcm.ca/english/cscd/cscd.html>
- **InfraGuide** - InfraGuide is a national network of experts and a growing collection of best practice publications for core infrastructure - offering the best in Canadian experience and knowledge of infrastructure. Available at: <http://www.infraguide.ca/>
- **Harmony Foundation's Green Cities – a Guide to Sustainable Community Development** – A 124-page guide that provides a clear and comprehensive overview of Sustainable Community Development, inspiring community success stories and lots of practical information, including how to establish community priorities, encourage citizen participation, and build local leadership. References, worksheets, facts on important trends Available at: <http://www.harmonyfdn.ca/pubs.html#GreenCities>
- **Sustainable Cities** - Sustainable Cities is a small catalytic organization that tackles the daunting challenges of urban sustainability. Headquartered in Vancouver, Canada, with an active network of over 40 cities in 14 countries, Sustainable Cities is a think tank and a "do tank," with practical demonstration projects and peer learning networks, and scaling those lessons out through affiliations and high-profile events. Available at: <http://sustainablecities.net/>
- **ICLEI – Local Governments for Sustainability** – ICLEI is an international association of local governments and national and regional local government organizations that have made a commitment to sustainable development. More than 475 cities, towns, counties, and their associations worldwide comprise ICLEI's growing membership. ICLEI works with these and hundreds of other local governments through international performance-based, results-oriented campaigns and programs. Available at: <http://www.iclei.org/>
- **Towards Sustainable Communities: A Resources for Citizens and their Governments** – A book from Simon Fraser University's Centre for Sustainable Community Development that is full of innovative projects that have been implemented around the world. Available at: <http://www.sfu.ca/cscd/>
- **Making the Case for Culture** – A document released from creativecity.ca, an organization of people employed by municipalities across Canada working on arts, culture and heritage policy, planning, development and support. It includes a number of best practices of communities that have used culture as an economic engine. Available at: <http://www.creativecity.ca/resources/making-the-case/>
- **The Natural Step for Sustainable Communities – How Cities and Towns can change to sustainable practices** – A book that contains case studies and best practices of communities around the world that have used The Natural Step Framework for sustainability planning. Available at: <http://www.naturalstep.ca/resources.html>
- **Sustainability: Step by Natural Step** – The Natural Step's eLearning course contains numerous examples of initiatives taken by communities and business. Available at: <http://www.naturalstep.org/elearning>



## Appendix 27: Guidance on Prioritizing Initiatives

**Strategic Question #1: Does the initiative move the community system in the right direction (i.e. toward our community vision, our Description of Success and alignment with the four sustainability principles?)**

Consider whether the initiative will:

- Reduce the community system's contribution to the systematic increases of substances extracted from the earth's crust?
- Reduce the community system's contribution to the systematic increases of chemical and compounds produced by society?
- Reduce the community system's contribution to the progressive physical degradation and destruction of nature and natural processes?
- Reduce the community system's contribution to conditions that interfere with people's ability to meet their basic human needs?

**Strategic Question #2: Does the initiative provide a stepping stone (or flexible platform) for future sustainability actions and improvements?**

Becoming sustainable doesn't happen overnight. It takes many steps, each one building on the step before. Therefore, it's important that an action taken today provides a platform for the next step tomorrow.

The stepping stone question is particularly important when you're screening an initiative that will tie up the resources of your community system for a long time. It is particularly important to avoid expensive initiatives that will result in sustainability dead ends. An example is a significant financial investment in a technology that will lock the community system into the continued use (and uncertain price) of fossil fuels for decades to come.

Answering some stepping stone questions may require technical research and analysis by an inter-disciplinary team. Others, involving large projects with big price tags, will probably need extensive analysis because the size of the investment will impact what possibilities and choices will be available in the future. In terms of carrying out a quick assessment, we recommend you keep your analysis of such questions and projects at a high level and flag them as needing more detailed consideration in the future.

**Strategic Question #3: Does the initiative generate a sufficient return to seed future actions?**

This question relates to the financial and political feasibility of the initiative. Will the initiative provide an 'easy win?' Will it yield 'low-hanging fruit?' A good financial case for a proposed action is important for buy-in (literally), and a good return will yield financial resources to fund other actions. Some actions are worthwhile because they build political and/or public support for future moves. In general, compare the progress toward sustainability you believe the action will produce against the net cost of the action. The best actions will have the best "progress to net cost ratios."

Use the questions below to help analyze the financial and economic implications of any given initiative. As with the stepping stone analysis, note that the size of the project will determine the depth of financial analysis needed.

## Appendix 27: Guidance on Prioritizing Initiatives

### i. Calculate what progress will be made as a result of the action

- What progress is likely to be made toward the Description of Success and the sustainability principles? What is the anticipated performance of this action? Quantify this progress where possible (for example 30 per cent reduction in greenhouse gas emissions).
- What are the expected qualitative benefits (e.g. an opportunity for the organization to participate in a new cooperative program that reduces the cost of green procurement)?
- What are the anticipated economic spin-offs associated with the action? Does the action help to better use today's infrastructure (social and physical) and defer expenditures? Does the action save the use of other resources?
- What are the anticipated political or social benefits from the project?

### ii. Calculate the net cost of the action

Compare the total costs of the action with the total revenues associated with the action. As a general guide, consider the following:

#### Direct Costs:

- What is the total capital cost?
- What are the total up-front administrative costs (for example, human resource costs for preparation of a new policy, etc.)?
- What are the expected total operating expenses? Use as long-term a view as possible: the term should reflect the action or project's true lifetime.

#### Direct Savings and Revenue:

- What is the potential revenue generated by the action?
- What are the total capital savings realized by taking the action?
- What are the total operational savings expected by taking this action? Use as long-term a view as possible: the term should reflect the action or project's true lifetime.

#### Other considerations:

- Will the action contribute to the operational efficiency of the community system?
- Will it provide an early return on investments?
- What is the level of risk associated with taking the action (or failing to take the action)?
- Will there be social and/or political costs? What are they?

While calculating the net cost of the action, keep in mind that the long-term goals of the community need to be aligned with ongoing economic realities. Each action is designed to move the community system toward the Description of Success, meaning it must pay off quickly enough to optimize future progress via its financial returns and/or the increased social or political capital it generates.



## Appendix 28: Using the 3 Strategic Questions to Assess Initiatives – Case Study of Whistler’s Natural Gas Pipeline

Whistler, British Columbia, is a resort community north of Vancouver. In 2005, during the lead-up to the 2010 Olympic Games, it was faced with the prospect of increasing energy demand resulting from community growth and preparation for the Olympics. Whistler’s heating needs had long been provided by propane, electricity and diesel fuel, in that order. Most of the propane arrived by rail or truck, was stored in tanks, and then distributed via pipes. The service was provided by Terasen Inc. – the parent company of Terasen Gas companies, the principle natural gas distributor in the province of British Columbia. Knowing that the existing propane system had reached its capacity, the municipality turned to Terasen for suggestions. The Whistler 2020 team, which coordinates the implementation of Whistler’s sustainability vision, used The Natural Step’s strategic questions to decide on the most sustainable solution for the community’s energy needs. Their answers to the questions at the time are listed below.

### 1) Would the project move Whistler closer to its sustainability objectives (principles)?

Using natural gas offers an incremental improvement in greenhouse gas emissions (Sustainability Principle 1- SP1) in the short-term, but not in the long-term. Energy use and emissions are expected to rise in the future if natural gas is the preferred form of energy.

#### Notes:

- Due to the higher energy stored in the carbon-hydrogen bonds in natural gas (methane), natural gas burns much cleaner when compared to propane (which has lower energy carbon-carbon bonds), the main fuel being substituted. Due to the lower percentage of carbon atoms per giga-joule of energy, natural gas (methane) releases approximately 15 per cent less carbon dioxide than propane (SP 1);
- Whistler’s green-house gas emissions would therefore drop initially, but then due to the growth in energy demand they would rise and eventually surpass historical levels (SP 1);
- The natural gas system will be slightly more reliable (SP 4) than propane from a national transportation perspective, since propane is currently shipped by rail and truck. That being said, there has never been a supply issue in the past;
- Natural gas is a safer fuel (SP 4) than propane, since it doesn’t concentrate in low lying areas due to its weight;
- The project meets the community’s future demands for energy (SP 4) as forecast by Terasen (energy supplier);
- The project provides the opportunity for a natural gas vehicle strategy;
- Amortizing the project over 50 years, it is slightly less expensive (SP 4) than propane would be;
- The project provides an opportunity to use the existing propane tank farm land (SP 4) for alternative uses such as housing, a park or a multi-fuel energy bar (biodiesel, natural gas, gas, ethanol etc...).

#### Potential trade-offs:

In the next 15 years or so, there is a high probability that Canadian domestic natural gas supply is going to be replaced by shipments from less developed, unstable countries with various levels of worker safety regulations, etc. (SP 4). Propane, on the other hand, will continue to come from Canada. This means that there may be a trade-off with respect to Sustainability Principle 4 in shifting to natural gas.

## Appendix 28: Using the 3 Strategic Questions to Assess Initiatives – Case Study of Whistler’s Natural Gas Pipeline

### 2) Since the project will not take the community all the way to its sustainable energy objectives, would the project be a flexible platform for future investments? What next?

In order to see an absolute reduction of greenhouse gas emissions in the future, a transition away from natural gas toward a renewable form of energy is required (for example, geothermal). Therefore, the natural gas pipeline is only a flexible platform if it is used as a temporary solution, and an investment in the transition toward renewable energy.

#### Additional considerations:

- It would be expensive and tie up capital over 50 years, making it more difficult to do something else in the short term or in later years;
- It would introduce natural gas to all the new customers thus making it more difficult to change in the future;
- The rates would be driven down as more people are added to the system, which would create an incentive to use natural gas. This could lead to increased consumption and greenhouse gas emissions;
- New transportation infrastructure would need to work with natural gas and it may not be flexible to other fuels;
- The retrofits required on all appliances to accommodate natural gas will take up people’s time and energy and perhaps make them less likely to try some other technology or fuel in the short term future;
- Building technology utilizing natural gas for heating is compatible with many other types of energy systems.

### 3) Would the project generate an adequate return on investment<sup>13</sup>?

Natural gas prices are expected to track four dollars less per GJ than estimated propane rates. The amortization schedule is over 50 years, and as long as the natural gas demand is growing, customers are expected to see rate savings immediately after the conversion. Terasen is regulated by the utility commission, and essentially they pass on costs to their customers who are then allowed to make a set return on that investment.

It is difficult to forecast the prices of natural gas, but if all goes as planned it would be a better investment than the propane option.

#### What did Whistler end up doing?

Some members of the community and Council began asking the strategic planning questions outlined in Whistler’s 2020 plan (based on the TNS strategic questions). Town managers then went back to Terasen and reiterated the community’s goals as outlined in the Whistler 2020 document. Since the municipality took the perspective that an investment in a natural gas pipeline must be part of a transition to a sustainable energy system, it engaged Terasen in a discussion on how they could help Whistler move toward its Whistler 2020 goals and ultimately toward a future free of fossil fuels as a fuel source. Through this discussion, the municipality discovered that Terasen had a nascent renewable energy division.

After a couple of months of deliberating, the municipality and Terasen’s utilities division worked out a plan for investigating and pursuing an alternative energy solution pathway. The following actions were proposed or implemented:

- Due to the reduction in throughput of the pipeline from 20,000GJ/day to 10,000GJ/day, the cost of the pipeline was reduced from \$50 million to \$30 million, and the amortization period was reduced from 50 years to 25 years. The lower cost and shorter amortization period are important to note, because they ensured that the

<sup>13</sup> This response assumes costs and benefits as measured by the market.



## Appendix 28: Using the 3 Strategic Questions to Assess Initiatives – Case Study of Whistler’s Natural Gas Pipeline

community would not be locked into a certain form of energy for 50 years. In the future, the municipality planned on switching Whistler to geothermal energy, however this transition would have been made more difficult if they were still paying off the pipeline;


- Terasen and the RMOW would explore the potential for ground source heating and cooling for new developments including the 2010 Olympic Athletes’ Village, as well as existing developments, including the main village in Whistler;
- The municipality is currently setting up a new utility to provide district-based thermal energy for the new Cheakamus Crossing neighbourhood (Athletes Village legacy neighbourhood);
- The rate target of the thermal energy is set to 10 per cent below electricity rates to encourage new developments to use these systems instead of electric baseboard heating;
- Other alternative energy technologies and fuels such as gas created through gasifying solid waste, and landfill gas will be explored to determine their true potential;
- New infrastructure will be encouraged to use ground source heating and at least some form of flexible building technology for heating and cooling so that various energy systems can be connected in the future;
- Natural gas will be used where alternatives are not feasible and also to provide peaking fuel during heavy energy load periods when it is uneconomical to use ground source systems.

Using this strategy, GHG emissions are expected to drop, rise a little, then decrease as users switch to the ground source heating and cooling system.

# Appendix 29: Sustainability Filter

**1** Does the action/decision move us in the right direction?

- Does it take us closer to our vision?
- Is it aligned with our core purpose, core values and strategic initiatives?
- Does it move us closer to alignment with the four sustainability principles? (see below)

**Sustainability Principle #1** 


Reduce our part in digging stuff out of the Earth's crust that builds up faster than nature can cope.

**FAVOURING**

- Energy efficiency and power from renewable sources
- Metals that are plentiful (aluminium, iron etc...)
- Re-usable, recyclable and recycled content materials

**AVOIDING**

- Energy inefficiency and fossil fuel power
- Metals that are scarce in nature (mercury, cadmium, lead, nickel etc...)
- Disposable, non-recyclable and materials made from unused resources

**Sustainability Principle #2** 


Reduce our part in creating man-made compounds/chemicals that build up faster than nature can cope.

**FAVOURING**

- Natural, biodegradable materials (glass wood, cotton, water-based etc.)
- Materials that are managed in tight technical cycles
- Organically grown, untreated
- Re-usable, recyclable and recycled content materials

**AVOIDING**

- Petroleum-based and synthetic (esp. toxic and hazardous) materials
- Materials that are likely to be dispersed into nature
- Chemically grown, treated
- Disposable, non-recyclable and materials made from unused resources

**Sustainability Principle #3** 


Reduce our contribution to physically damaging natural systems that serve us ( e.g. water filtration).

**FAVOURING**

- Materials from well-managed ecosystems
- Fast-growing crops (hemp, bamboo etc...)
- Use of previously developed lands
- Re-usable, recyclable and recycled content materials

**AVOIDING**

- Over-harvested resources
- Slow-growing, resource-intensive methods
- Use of undeveloped green space
- Disposable, non-recyclable and materials made from unused resources

**Sustainability Principle #4** 

Reduce our contribution to creating societies in which many people cannot meet their basic needs.

**FAVOURING**

- Safe working and living conditions
- Inclusive and transparent decision-making
- Affordable products and services; sufficient resources for livelihood
- Political freedom

**AVOIDING**

- Unsafe living and working conditions
- Exclusive and closed decision-making
- Unaffordable products and services; economic barriers
- Political oppression

**2** Is it a stepping stone toward success and sustainability?

**FAVOURING**

- Safe working and living conditions
- Inclusive and transparent decision-making
- Affordable products and services; sufficient resources for livelihood
- Political freedom

**AVOIDING**

- Unsafe living and working conditions
- Exclusive and closed decision-making
- Unaffordable products and services; economic barriers
- Political oppression

**3** Does it provide a good return on investment?

**FAVOURING**

- Safe working and living conditions
- Inclusive and transparent decision-making
- Affordable products and services; sufficient resources for livelihood
- Political freedom

**AVOIDING**

- Unsafe living and working conditions
- Exclusive and closed decision-making
- Unaffordable products and services; economic barriers
- Political oppression

# Appendix 30: Action Implementation Summary Table

This worksheet is one simple example of a format that can be used to summarize i) who is responsible for seeing initiatives through, ii) the organizations that will provide support for the initiative, iii) the timeline for the initiative to be implemented, iv) the link to which indicator that will measure progress towards sustainability, and v) the link to other community systems. Every organization and community will create its own system for summarizing actions, timelines and responsibilities.

Key Community System: \_\_\_\_\_ (e.g. Water)

Action	Responsible Org.	Support Org(s).	Timeline	Indicator	Link to Other Community Systems
Install green roof on new community center	Parks Department	1) Public Works 2) Local Builder	1 year	Energy use	Energy, Built Environment

# Appendix 31: Example ICSP Partnership Agreement



## WHISTLER 2020

Moving Toward a Sustainable Future

### PARTNERSHIP AGREEMENT

Whistler holds a special place in the hearts of the people who live, work and play here. Together we can continue Whistler's success and move toward a future that is sustainable.

#### AS PARTNERS, WE SHARE WHISTLER'S VISION, VALUES, PRIORITIES, AND SUSTAINABILITY OBJECTIVES.

**OUR VISION** Whistler will be the premier mountain resort community – as we move toward sustainability.

**OUR PRIORITIES**

- Enriching Community Life • Enhancing the Resort Experience
- Protecting the Environment • Ensuring Economic Viability
- Partnering for Success

#### AS PARTNERS, WE ARE GUIDED BY OUR PARTNERSHIP PRINCIPLES.

##### COLLABORATION

We contribute reasonable resources toward efficiently and effectively achieving Whistler 2020 and partnership objectives.

##### OPEN COMMUNICATION

We communicate clearly and openly with our partners and other stakeholders about our expectations and limitations, and encourage them to do the same in an effort to build common understanding between us.

##### INTEGRITY

We consistently act with integrity and honesty, respecting the differences of our partners and stakeholders.

##### INNOVATION

We apply an approach of innovation, continuous improvement and shared learning to achieve Whistler 2020 and our partnership objectives.

##### INCLUSIVE ENGAGEMENT

We identify stakeholder groups that are affected by our decisions and offer meaningful opportunities for representatives to inform the decision-making process, while ensuring that decisions are made effectively and in a timely manner.

##### RESPONSIBILITY

We take responsibility for our acts and omissions, including our decision-making processes and the results of these decisions.

##### TRANSPARENCY

We are committed to disclosing to partners and stakeholders activities that positively or negatively affect progress toward Whistler 2020 and the objectives of our partnerships, unless such disclosures will place us at a competitive disadvantage in the marketplace or compromise other privacy commitments.

##### INTEGRATION

We integrate these Partnership Principles within our organizations and decision-making processes over time.

#### AS PARTNERS, WE SUPPORT THE IMPLEMENTATION OF WHISTLER 2020:

By aligning our activities with strategy descriptions of success, by reviewing and implementing feasible recommended actions, and by collaborating and sharing resources.

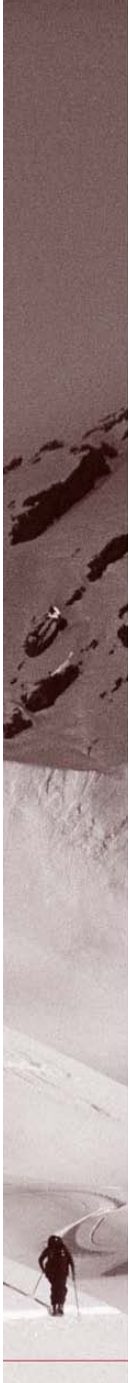
SIGNED THIS XXTH DAY OF MONTH, 2006.

SIGNED: \_\_\_\_\_

Name  
Organization

WITNESSED: \_\_\_\_\_

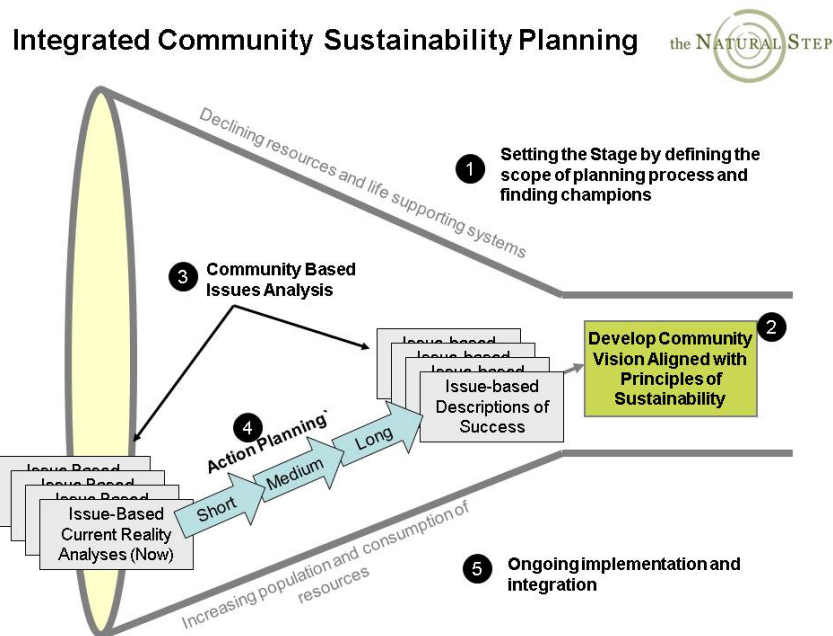
Mayor Ken Melamed  
Resort Municipality Of Whistler



# Appendix 32: A Case Study in Community Partnership - Whistler

Whistler2020 is truly a community-created sustainability plan, developed and committed to by approximately 30 formal partner organizations and businesses, 160 task force members who annually meet to review and improve the plan, and roughly 40 organizations implementing the task force actions. It is Whistler’s highest-level policy document, a long-term community-wide plan that is guided by local values and the Natural Step Framework.

As a planning document, Whistler2020 comprises the community’s shared vision of success to the year 2020 and the strategies needed to achieve that success. Although the plan targets the year 2020 for the vision and strategies, achieving all of the community’s sustainability objectives is a longer-term goal set for sometime before 2060. The figure below provides a conceptual overview of the approach used to develop the plan



Whistler2020’s vision foresees Whistler as: “The premier mountain resort community – as we move toward sustainability.” The plan identified 16 strategy areas (see below) that are intended to cover all aspects of the community. Food was recently added as a 17<sup>th</sup> strategy area:

Economic	Resident Housing	Resident Affordability
Health & Social	Arts, Culture & Heritage	Recreation & Leisure
Transportation	Built Environment	Energy
Water	Materials & Solid Waste	Visitor Experience
Learning	Natural Areas	Partnerships
Finance	Food	

## Appendix 32: A Case Study in Community Partnership - Whistler

For each strategy there is a task force composed of A) local experts in the strategy area, B) the organizations and businesses most likely to be responsible for implementation of the task force recommendations, and C) other stakeholders who are most affected by the strategy area and recommended actions (e.g., seniors, businesses, young families, etc.). A municipal staff team facilitates the process but does not determine the content.

The task forces developed Descriptions of Success for each strategy area, ensuring that those descriptions aligned with Whistler's long-term sustainability objectives. Task force members then assessed how aspects of the current community reality supported or contravened long-term goals, developed lists of recommended actions and defined indicators that could be used to track progress. Action ideas were then screened and prioritized for implementation.

In 2006, the task force process generated 142 recommended actions for potential lead organizations. Of these, 103 were accepted by the lead organizations – a 73% acceptance ratio. Once accepted, it is the responsibility of the lead organizations to ensure that the necessary plans and resources exist to successfully implement the actions. To provide transparency and build trust within the community and the task forces, lead organizations that choose not to implement their assigned actions are asked to provide rationale for declining the action and their statement is published on the Whistler2020 website and reported back to the recommending task force.

The community task forces review progress and performance results on an annual basis and recommend the “next step” actions that will move Whistler closer to its vision.

The strategies give the vision its legs; the actions that are recommended and implemented in each strategy area move the community towards its vision of success and sustainability.

Further actions are created and implemented by every Whistler2020 partner. The partners use Whistler2020 to guide and direct all of their actions as an organization - not just the ones that the task forces recommend.

Throughout the process, and on an ongoing basis, the wider community is kept abreast of Whistler2020's progress and performance through columns in the local papers and presentations to various groups in the resort community. A [website](#) that supplies important information also helps to ensure process transparency and accountability. Among other features, the website gives detailed information on each recommended action and its acceptance and implementation status and provides a “report card” on the community's recent performance at moving toward – or away from – its vision of success and its sustainability objectives.

*“Whistler’s adoption of TNS framework and its integration into Whistler2020 is currently contributing significantly to Whistler’s progress toward sustainability by enabling the development and implementation of innovative new decision-making tools as well as catalyzing ‘on-the ground’ actions through our community. For us in Whistler, we have found the framework to be broadly applicable across all areas of the community (from energy systems to arts and culture) and to all levels of decisions (from purchasing paper to developing a tourism strategy). It also provides the critical shared language and ultimate end goals that have allowed the community to move beyond discussions about what sustainability is, to action planning for how to get there.”*

**-Whistler Mayor Ken Melamed**



## Appendix 33: Resources for Sustainability Reporting

Many businesses and municipalities are accustomed to providing annual reports that focus on finances and major accomplishments. A sustainability report provides information on the community's progress toward achieving its sustainability goals. These reports can range from simple documents to externally-reviewed reports. Some examples and resources for sustainability reporting include:

1. The **Town of Okotoks** in Alberta has a website that provides information on its progress toward sustainability with its Sustainable Okotoks project. Visit <http://www.okotoks.ca>.

2. The **Canmore Community Monitoring Program** of the Town of Canmore, in association with the Biosphere Institute of the Bow Valley, produces a bi-annual report detailing demographic, social, economic, and environmental trends and conditions in the community. This program grew out of the recommendations of the 1995 Growth Management Strategy Report. Visit <http://www.biosphereinstitute.org/rcom-indicators>.

3. The **Fraser Basin Council (FBC)** is an organization that is focused on advancing sustainability throughout the entire Fraser River Basin in British Columbia. A number of sustainability reports and updates from communities in the FBC can be found at: [http://www.fraserbasin.bc.ca/publications/fbc\\_reports.html](http://www.fraserbasin.bc.ca/publications/fbc_reports.html).

4. **AccountAbility** is a non-profit organization in the UK that has created an internationally-recognized set of stakeholder engagement and sustainability reporting standards as part of their AA1000 series. Visit <http://www.accountability21.net>.

5. The **Sigma Project** has developed a free downloadable guidebook and a comprehensive set of tools for sustainability planning and reporting that are available at [www.projectsigma.co.uk](http://www.projectsigma.co.uk).

6. The **Global Reporting Initiative (GRI)** is an international, multi-stakeholder initiative aimed at creating a common global framework for voluntary reporting of the economic, environmental and social impact of organization-level activity. The GRI mission is to elevate the comparability and credibility of sustainability reporting practices worldwide. Visit [www.globalreporting.org](http://www.globalreporting.org).

7. The **Resort Municipality of Whistler** tracks and reports the municipality's status and progress toward the Whistler2020 Vision through Core Indicators and Strategy Indicators. It is one of the best examples of alignment of indicators and reporting with the sustainability principles. Visit <http://www.whistler2020.ca/whistler/site/allIndicators3.acds?context=1967970&instanceid=196791>

### Success Story

The Town of Stratford, Prince Edward Island created a steering committee of community residents to initiate the training of its staff and council and help the municipality develop a sustainability plan. Drawing on a vision to become a town that "will reflect the shared aspirations of Stratford residents and their responsibility for the well-being of each other, of future generations and of the earth," the Stratford Sustainability Plan was approved in September 2008. Among Stratford's achievements was the approval of a decision-making framework to ensure that prospective projects, policies and proposals will be evaluated for their contribution to sustainability. The Town has committed to publishing a 'Sustainability Report Card' as part of its Annual Report to measure and evaluate its progress toward sustainability.

## Appendix 34: Integrating Existing Planning Processes

Adapted from: Hallsmith, Gwendolyn. *Taking Action for Sustainability: The EarthCat Guide to Community Development*. pp. 25-27.

Many communities have engaged in some forms of planning, and will at any point in time be in the middle of some planning process. Plans may be developed by government agencies, industry councils and other private sector groups, or utility companies. Categories of such local planning includes:

Land use	Arts and culture
Solid waste	Recreation and tourism
Growth management	Historic preservation
Transportation	Water supply and wastewater
Economic development	Energy
Affordable housing	Air quality management
Open space protection	Workforce Development

In fact, if these processes have demanded a lot of time and energy, your community may be suffering from “planning burnout”, especially if the level of effort made has not resulted in concrete results. The approach presented here helps to build on the work of existing agencies, integrate it into your sustainability planning, and — above all — translate their vision and principles into action. By incorporating the other planning documents, where possible, into this process, you can avoid fragmentation or duplication of this process. If done right, this process is certain to make the champions of the other community improvement plans happy, as the community systems begin working together better.

Planning integration should take place at each stage in the process:

1. At the beginning, note the planning commitments that the community has already made. Review existing plans that have been prepared and adopted, and whether or not they are in effect. A transportation plan that was released three years ago but hasn't been fully funded is not obviated by the new sustainability plan; it is to be reviewed for whatever visions, goals, strategies, policies and programs it incorporates. The historic preservation working group created a few months ago by artists, developers and the tourism office should not be replaced by the present approach, but invited in and brought into dialogue with all the other stakeholders.
2. As your deliberations progress through the next few phases the individual plans that the community is committed to implementing should be an ongoing point of reference. Somebody — the process leader, the Citizens Advisory Group, or a small group of stakeholders — should cull these plans for ideas that can be brought into the deliberations for the sustainability plan. Ideas listed in these plans may be subject to debate and may need further refining, but they are raw material for this planning process at every stage. The work you will be doing with systems analysis and strategy development may give the community a way to implement an idea from an existing plan that has heretofore seemed too complex, expensive, or politically difficult.

## Appendix 34: Integrating Existing Planning Processes

- At the end of the sustainability planning process, when you are creating your Action Plan, the work will include integrating the relevant action steps into each existing plan, and making sure that your overall implementation plan continues the coordination of all these efforts.

One important benefit of bringing the variety of different planning efforts together is that the community will be better able to see the links between the various concerns, and the interdependence of their proposed solutions. Priorities may then be set for the proposals taken as a whole, rather than dealing with each separate compartmentalized issue on its own.

One technique to get the process of alignment off on the right foot is to convene a community meeting dedicated to hearing from all the groups who have community improvement plans pending or already underway. Make a celebration out of it, and structure the process so that each group can describe their highest priorities to the gathering. As you become more familiar with the techniques outlined in this workbook, you will probably find that there is a lot that this process can offer to help revive these other plans and put some of their most important recommendations into action. The following chart illustrates how you might account for the various planning processes and organizations you will need to consult to ensure that your own efforts properly consider the goals and objectives that have been developed elsewhere.

### Plan Alignment Chart

Planning Process Underway	Timeframe	Responsible Agency & Contact Person w/ contact info
Transportation Plan	Ten years, updated every five years	Metropolitan Planning Organization (MPO) Jane Buck, Planning Director 333-4444, jbuck@planning.edu
Open Space Plan		
Land Use Plan		
Recreation Plan		
Economic Development Plan		
Solid Waste Plan		

## Appendix 35: Best Practices: Governance and Decision Making

The following is a list of ten best practices for incorporating sustainability into governance systems based on The Natural Step's research in community sustainability planning. The list is derived from the experiences of Canadian municipalities.

- **Best Practice #1:** Create a shared understanding of sustainability that can be integrated into the long term goals of the organization.
- **Best Practice #2:** Establish sustainability as a corporate strategic priority. Making it a priority of the Senior Management Team will signal to all departments that their business plans and budgets need to address sustainability.
- **Best Practice #3:** Constantly and persistently communicate the sustainability need, vision, strategies, priorities, etc.
- **Best Practice #4:** Establish the sustainability initiative within a part of the organization that has credibility with the rest of the organization to lead it (e.g. a corporate function), so the sustainability initiative is not seen as “one department telling another what to do”.
- **Best Practice #5:** Conduct a corporate-wide sustainability analysis to identify key priorities and cross-cutting themes that act as a focus for multi-departmental initiatives.
- **Best Practice #6:** Establish teams consisting of people from across the organization and at different levels of management to support the analysis and its implementation.
- **Best Practice #7:** Establish a sustainability training program to help people understand what sustainability is, why it is important and how to integrate it into their work.
- **Best Practice #8:** Integrate sustainability into policies and procedures so that people have the training, resources, incentives and guidance to understand sustainability and act on it.
- **Best Practice #9:** Connect with stakeholders outside of the organization to create a critical mass of people engaged in sustainability.
- **Best Practice #10:** Report on progress and learn from the journey.

In addition to these best practices, there are three broad phases to consider. Please note that these three phases are presented in loose chronological order to provide guidance, but should not be considered strict steps. They include:

1. **Setting the Foundation:** This consists of putting the foundation in place to successfully integrate sustainability into decision-making systems, which includes establishing and demonstrating leadership commitment, ensuring proper structures and staff are in place, clarifying the desired sustainable outcome, and having a clear understanding of current performance against the desired outcome, etc.

2. **Engaging the Broader Organization:** This consists of engaging the broader organization through a broad corporate-wide training program on sustainability, hosting workshops to identify possible strategies and actions in departmental business plans, developing and refining decision-making tools, embedding sustainability into reward systems (e.g. performance agreements), developing indicators and reporting systems, etc. The first two phases can be considered “getting our own house in order” to provide credible leadership for a broader stakeholder/ community initiative.

3. **Engaging Stakeholders and the Broader Community:** This consists of engaging the broader community of stakeholders in a sustainability planning initiative, and includes training programs, visioning processes and workshops, multi-stakeholder forums, events to celebrate success, etc.

## Appendix 36: Additional Resources

The following is a collection of key resources that will support your team through various aspects of developing a sustainability plan for your organization. There are likely other resources you are already familiar with or will come across that can provide additional inspiration and guidance on your journey.

### Personal Leadership

Goleman, Daniel, Richard E. Boyatzis and Annie McKee, *Primal Leadership: Learning to Lead Emotional Intelligence*, Harvest Business Press, 2002.

Kouzes, James M., and Barry Z. Posner, *The Leadership Challenge*, John Wiley & Sons Inc., 2007.

Wheatley, Margaret J., *Leadership and the New Science: Learning about Organization from an Orderly Universe*, Berrett-Koehler Publishers, 1994.

### Organizational Change

The Appreciative Inquiry Commons  
<http://appreciativeinquiry.case.edu/>.

Collins, James Charles, *Good to Great: Why Some Companies Make the Leap—and Others Don't*, Harper Business, 2001.

Doppelt, Bob, *Leading Change toward Sustainability: A Change-Management Guide for Business, Government and Civil Society*, Greenleaf Publishing, 2003.

Doppelt, Bob, *The Power of Sustainable Thinking*, Earthscan, 2008.

Hamilton, Marilyn, *Integral City: Evolutionary Intelligences for the Human Hive*, New Society Publishers, 2008.

James, Sarah and Philip B. Herr, *Swamp Yankee Planning for Sustainability - A Bottom-Up Process for Becoming an Eco-Municipality*, Cambridge & Newton, 2007.

Kotter, John P., *Leading Change*, Harvard Business Press, 1996.

McDonough, William, *Cradle-to-Cradle: Remaking the Way we Make Things*, North Point Press, 2002.

Principles of Smart Growth –  
<http://www.smartgrowth.org/about/principles/default.asp>

Senge, Peter, Bryan Smith, Nina Kruschwitz, Joe Laur, and Sara Schley, *The Necessary Revolution*, Doubleday, 2008.

Senge, Peter, *The Fifth Discipline: The Art and Practice of the Learning Organization*, Random House, Inc., 2006.

Sterman, J. D., *Business Dynamics: Systems Thinking and Modelling for a Complex World*, McGraw-Hill, 2000.

Willard, Bob, *The Next Sustainability Wave*, New Society Publishers, 2005.

Willard, Bob, *The Sustainability Advantage*, New Society Publishers, 2002.

### Adult Learning

Knowles, Malcom Shepherd, Elwood F. Holton, and Richard A. Swanson, *The Adult Learner: The Definitive Classic in Adult Education and Human Resource Development*, Gulf Professional Publishing, 1998.

### Facilitation

Condon, P, *Design Charrettes for Sustainable Communities*. Island Press: Centre for Resource Economics, 2008.

Isaacs, William, *Dialogue and the Art of Thinking Together*, Doubleday, 1999.

Owen, Harrison, *Open Space Technology: A User's Guide*, Berrett-Koehler Publishers, 1997.

Scharmer, C. Otto, *Theory U: Leading from the Future as it Emerges*, 2007.

Schwarz, Roger M., *The Skilled Facilitator: A Comprehensive Resource for Consultants, Facilitators, Managers, Trainers, and Coaches*, John Wiley & Sons, 2002.

The World Café – <http://www.theworldcafe.com>.

### Miscellaneous

Global Footprint Network – <http://www.footprintnetwork.org>.

Wilber, Ken, *Introduction to Integral theory and practice: IOS Basic and the AQAL map*, *Journal of Integral Theory and Practice*, 2005.

The Natural Step has assembled an online list of additional links, toolkits, case studies and other resources for deepening your understanding and taking action Visit the Natural Step Website <http://www.thenaturalstep.org/canada>.



## About The Natural Step

The Natural Step Canada is a national not-for-profit organization that provides training, coaching and advice on how to advance the practice of sustainability. Our mission is to connect every leader in Canada with the inspiration and education they need to integrate economic, environmental and social priorities into their planning and decision making.

We offer a clear, compelling, science-based understanding of sustainability and a practical strategic planning framework to help organizations make the choices that will move them toward sustainability.

Our role is to act as coaches, to help our partners build the leadership, commitment and capacity they need to transform their organizations. We help create alignment among teams, departments and stakeholders through the development of a common language and a shared vision of success for sustainability. We also act as a hub for a growing network of sustainability leaders and champions who are sharing and learning from each other.

Founded in 1989 in Sweden by Dr. Karl-Henrik Robèrt, The Natural Step now has offices in 11 countries, including Canada.

The Natural Step Framework for strategic sustainable development is being used internationally by hundreds of organizations, including Fortune 500 companies, government departments, universities, municipalities and small and medium-sized businesses in their respective journeys to sustainability.

*“The whole world has dreamt about a definition of sustainability that would allow systematic, step by step planning. When it arrived, delivered by The Natural Step, it was remarkable to see how simple it was.”*

**-Paul Hawken, Author,  
Natural Capitalism and  
Blessed Unrest**

### Going Deeper

To read the story of how The Natural Step was developed, check out *The Natural Step Story: Seeding a Quiet Revolution* by Dr. Karl-Henrik Robèrt (New Society Publishers, 2002). For more information, please visit [www.thenaturalstep.org](http://www.thenaturalstep.org).

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