

Town of South Bruce Peninsula Corporate Strategic Plan 2020-2025



October 2020



Town of
**SOUTH BRUCE
PENINSULA**



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Executive Summary

In 2020, the Council for the Town of South Bruce Peninsula initiated the creation of a 5-Year Corporate Strategic Plan. Town Council and staff recognized the need to establish a results-based plan that would guide decisions, planning and budgeting into the future. This Strategic Plan provides the long-range guidance that enables the Town to advance priorities, strengthen municipal operations, identify key performance outcomes, and allocate the resources required to pursue implementation. The pages that follow reflect the collective vision of the community, municipal staff, Town Management and Council. It is a corporate strategic plan that provides a roadmap to the future. Successful implementation of the plan will require strong leadership to stay true to the course.

The consultation provided an opportunity for engagement of the public, key community stakeholders, municipal staff, management, and Council. Input was gathered through on-line surveys and meeting, telephone interviews, and face-to-face workshops.

The Corporate Strategic Plan was created within the context of the Town's new Vision Statement, Mission statements and the five Guiding Principles that reflect corporate values. Collectively, this is the foundation on which the Strategy is built and from which it will be implemented and monitored.

Vision: A progressive, attractive, and welcoming community, standing proud.

Mission: Through responsible leadership, provide sustainable services that are efficient and effective.

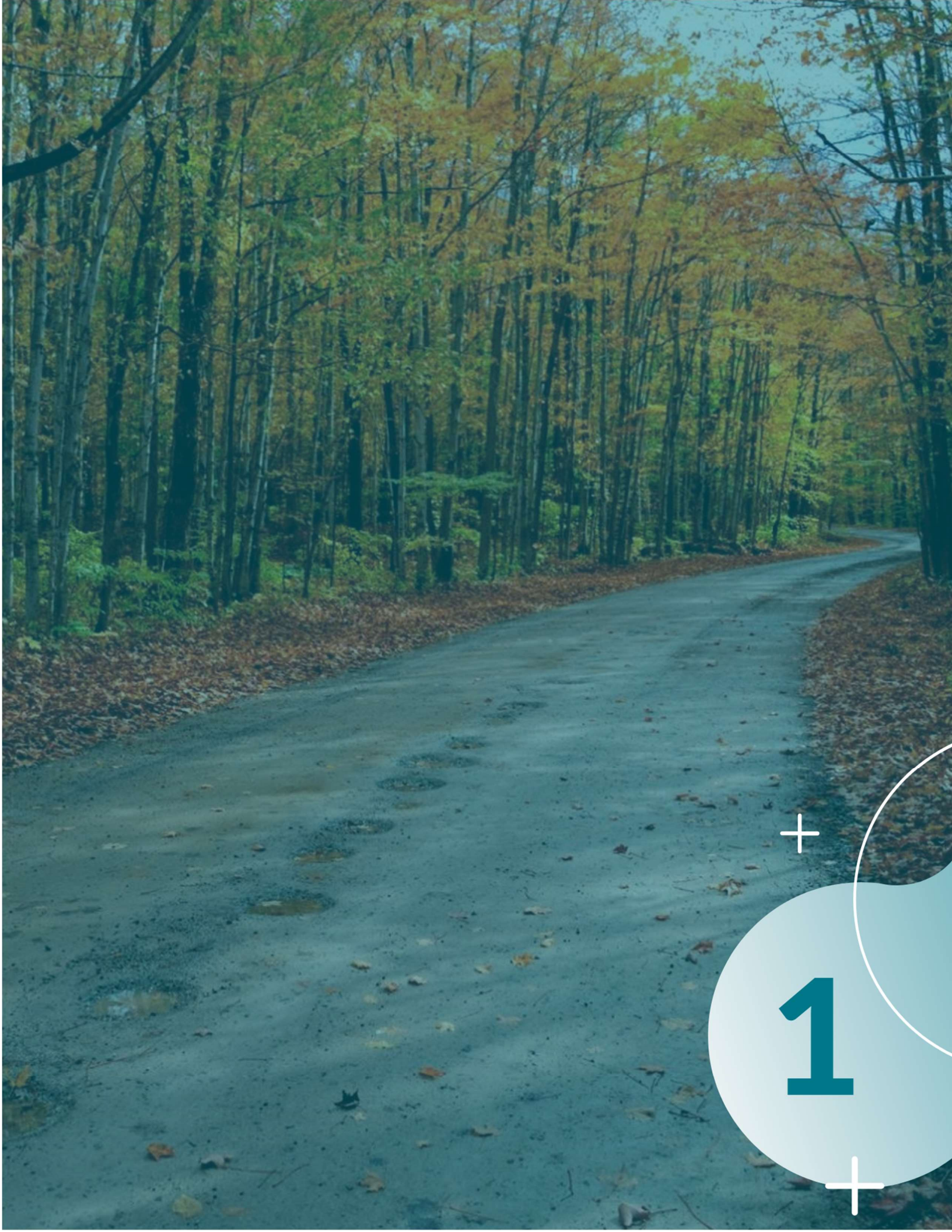
Guiding Principles: Honesty and Integrity; Respectful and Healthy Workplace; Fiscal Responsibility; Service Excellence; Open and Transparent; Safe, Compassionate and Fair

A series of key strategic goals were identified and validated, all of which are further informed by accompanying priority objectives which will guide actions and tactical initiatives identified within the municipality's departmental business or work plans.

Goals: Transparent and Accountable Governance; Sustainable Infrastructure; Collaboration and Partnerships; Healthy, Vibrant and Safe Communities; Stable Economy

It is important to recognize that while the Corporate Strategic Plan will serve as a guide for municipal activities, it is not meant to be exhaustive. There will be other activities undertaken by the Municipality that align with legislated responsibilities, initiatives already underway and emerging priorities that may require immediate attention. The Strategic Plan will serve to focus efforts and guide resource allocations to address the most significant priority areas identified during the planning process.

The following pages offer a concise summary of the Town of South Bruce Peninsula's Strategic Plan 2020-2025. Supplementing the Strategic Plan is a Technical Report. This report presents primary and secondary research findings and analysis of all consultations that formed part of the project methodology.



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Methodology

The development of this strategic plan was supported by the establishment of a Steering Committee comprised of representatives of Council, senior staff, and the consultants. From the outset, the project was designed as a collaborative effort that would provide ongoing opportunities for input and validation by staff, stakeholders, and members of the public. The methodology employed to build the plan is described below.

Developing the Strategy

Situational Analysis

To maximize the knowledge and understanding of the Town of South Bruce Peninsula's current state, and the influencing factors impacting municipalities, a comprehensive review of select literature and studies was undertaken. This review provided important context in understanding current and emerging trends that influence the direction and goals of the municipality. A review of relevant documents provided by Town Staff was augmented by an analysis of key regional, provincial, national, and global trends. The consulting team created a matrix to show inter-relationships between and among existing plans and strategies. This exercise offered an evidence-based analysis of priorities and strategic objectives already identified.

Community Profile

A community profile detailing significant demographic trends was prepared as background for the initial engagement with Council and senior staff. Using gathered literature and information provided by the Town in conjunction with data obtained from Statistics Canada and Canadian business counts data, etc., a snapshot of the socio-economic profile of the Town was created that provided insight into key patterns of change and trends. An enhanced level of current community information and analysis was prepared through economic and demographic modelling that extended beyond the Census period for the Town of South Bruce Peninsula.

Conversations with Council Members and Senior Management

Early in the project, the consulting team conducted individual interviews with members of Management and Council. These interviews generated input on a variety of important topics, including desired outcomes from the Strategic Planning initiative, current and future service levels requirements and desires, resource constraints that may impact operations, human resources, business climate, quality of life, identification of gaps and opportunities, and aspirations for the community. Insight garnered from these interviews was cross-referenced with key findings emerging from other elements of consultation.

Conversation Circle with Staff

The consulting team facilitated an online session with selected staff, including discussion and gathering of opinions via the online platform Mentimeter. We used this engagement process to seek feedback about current pressure points, how the Town should operate differently in the future, changes in staff needs and expectations, changes in technology, competitive strengths and weaknesses via-à-vis other municipalities, reflection on the Town's vision, mission, guiding principles, and insight into key goals and objectives necessary for future success.



Strategic Planning Workshop with Council and Senior Management

During this workshop, members of Council and Senior Management shared insights on municipal strategic planning. Through discussion facilitated by the Queen's Executive Decision Centre, a collective perspective emerged. The session provided an opportunity to hear from Council members on their vision and validate key principles by which Council grounds its decisions. The session identified key issues and areas requiring further input and insight.

Key Informant Interviews

The consulting team conducted 24 comprehensive, one-on-one stakeholder interviews through telephone outreach. With Steering Committee/Project Team input, key informants were identified from a wide range of organizations, businesses, and community partners. Their insights about the town ranging from quality of life to service delivery, workforce, and local economic competitiveness will be sought. The interviews were critical to providing perceptions of significant challenges facing the Town in the future, perceptions of municipal services or programming including gaps, suggestions regarding programs or services the Town should consider developing/revitalizing, identification of South Bruce Peninsula's strengths and areas for improvement, insight into key goals and objectives necessary for future success, and desire and opportunities to work collaboratively or in partnership with the Town.

Public Consultation – Online Survey

As part of its efforts to validate the proposed Strategic Pillars and Priorities, the Town undertook a public online survey that was promoted using various social media channels. The survey was conducted using Open Mic. Survey questions were developed in collaboration with the consultant and designed to support the public's engagement with the strategic planning process and elicit feedback on the pillars and priorities as proposed. It was further designed as an opportunity to identify any gaps, and to suggest additional priorities that respondents felt should have been included.

SOARR™ Analysis

Drawing from all input, the consulting team built out a SOARR Analysis into each of the five areas: Strengths, Opportunities, Aspirations, Risks, and Results. This comprehensive summary reflected emerging themes, goals, objectives, and insights to inform strategy development.

Front-Line Staff and Management Consultations

Staff across the corporation participated in workshops designed to assess the proposed priorities in more detail and to identify the actions and tactics that would best support those priorities. Two workshops were facilitated in-person by the consulting team over one day with more than 30 staff participating. As part of the workshop, attendees were asked to identify any additional priorities that they felt should be brought forward for Council's consideration.

Input Summary Report

Input gathered through the various consultations processes was summarized and provided to Council for their consideration as they worked to refine the plan.



Refining the Strategy

Council and Senior Management Engagement Sessions

During this workshop Council considered the feedback of staff and stakeholders in finalizing goals and priority objectives. Input was also sought on updating the Town's vision and mission statements and validating the guiding principles of the municipal corporation.

Senior Management Session

Senior Management met with the consulting team to craft actions to support implementation of the Strategic Plan. This session also provided an opportunity for Management to put forth clarification questions and to offer insight and perspective related to potential resource needs to advance the priorities and actions emerging through the process.

Finalizing the Strategy

Presentation of Draft Strategic Plan

The consulting team presented the draft Corporate Strategic Plan to Council and sought feedback for preparation of the final document.

Delivery of Final Report

The consulting team delivered the final report to Town staff for distribution.



BOOKS
MUSIC
GIFTS

COMPLETE
WILKINS

OPEN
Amazing phones
great brands.

The Cluttered Cupboard
CLEANLY - FRESH FOOD & DRINKS
THE ALLERGEN-FRIENDLY
100% & 100% OF
100% TO 100%

Planet Fitness

Joie's
Creating Moments in Time
Trenton, NJ

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Core Strategic Plan Elements

Vision

“A progressive, attractive and welcoming community, standing proud.”

Mission

“Through responsible leadership, provide sustainable services that are efficient and effective.”

Guiding Principles

Honesty and Integrity

- Honour truthfulness and accuracy in our intentions and actions
- Demonstrate sound judgement and dependability

Respectful and Healthy Workplace

- Leadership celebrates employee potential and demonstrated contributions
- Goals are communicated clearly and appropriate supports foster successful implementation
- Dual perspective is respected and intergrated into our interactions and communication

Fiscal Responsibility

- Public finances are managed effectively with a commitment to longer-term fiscal sustainability
- Investment and policies act as catalysts for community prosperity

Service Excellence

- Our customers, that being our citizens, stakeholders, and employees, receive exceptional service
- Programs and services are accessible to all

Open and Transparent

- Topics and issues are discussed in open meetings, and decisions are made with public input
- Municipal business is transparent and accessible

Safe, Compassionate and Fair

- People and community are at the centre of all decisions, building inclusiveness and accessibility
- Leadership honours and welcomes diverse voices



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Strategic Goals and Priority Objectives

1. Transparent and Accountable Governance

The Town of South Bruce Peninsula exercises its authority in a visible, responsible, united manner. The municipality utilizes a transparent and accountable governance framework resulting in sound, informed, decision-making.

2. Sustainable Infrastructure

The Town of South Bruce Peninsula is prepared to handle the demands of the future, respecting our environment. The municipality maintains sustainable and reliable infrastructure while retaining businesses and creating capacity for next-generation employment.

3. Collaboration and Partnerships

The Town of South Bruce Peninsula is cooperative, collegial, welcoming, and respectful. The municipality will work together and collaborate to deliver what we hope to achieve.

4. Healthy, Vibrant and Safe Communities

The Town of South Bruce Peninsula keeps its citizens and visitors safe and works with them to boost community vitality and resilience. Through collaborative efforts, Town Council can provide a voice for the needs of the less fortunate.

5. Stable Economy

The Town of South Bruce Peninsula desires a strong business ecosystem providing year-round, stable employment. The economy is supported by a skilled labour force.



Goals and Priority Objectives

A series of key strategic goals were identified and validated, all of which are further informed by accompanying priority objectives which will guide actions and tactical initiatives identified within the municipality's departmental business or work plans.





Goal 1: Transparent and Accountable Governance

1.1. Priority Objective: Open and transparent leadership

Action	Responsible	Timeline
1.1.1. Effectively monitor municipal spending, through an evidence-based budgeting process that considers citizen input	Council & CAO	Short
1.1.2. Develop a formal Communications Strategy that reflects a multi-channel approach to proactively engage and disseminate information with citizens and staff, informing programs, services, and financial planning	CAO & Senior Management	Short
1.1.3. Establish an Employer of Choice Strategy to enhance employee relations, and support employee retention and attraction	CAO & Senior Management	Short

1.2. Priority Objective: Informed decision-making

Action	Responsible	Timeline
1.2.1. Develop Long-term Capital Forecast to support effective and efficient planning	Treasurer	Short
1.2.2. Update statutory documents required by the Municipal Act, including Road Needs Study, Official Plan, Emergency Preparedness Plan, etc., to confirm compliance and practicality	CAO & Senior Management	Short
1.2.3. Ensure recommendations in reports and plans are acted upon on a priority basis to mitigate legal implications and to inform annual operating, capital, and rate budgets	CAO & Senior Management	Short
1.2.4. Monitor adherence to the Corporate Strategic Plan	Council & CAO	Medium



Goal 2: Sustainable Infrastructure

2.1. Priority Objective: Future-proof existing infrastructure

Action	Responsible	Timeline
2.1.1. Maintain existing infrastructure and assets through a supportive asset management plan and life-cycle planning practices	CAO & Council	Short

2.2. Priority Objective: Prepare for future infrastructure needs

Action	Responsible	Timeline
2.2.1. Create a Long-Term Financial Plan including new municipal infrastructure needs to position the community for sustainable growth	CAO & Senior Management	Medium
2.2.2. Implement recommendations of the Master Servicing Study to create capacity for growth and expand access to municipal services	CAO & Senior Management	Medium
2.2.3. Advocate for increased access to internet broadband connectivity through South Western Integrated Fibre Technology (SWIFT) and other partners	Council & CAO	Short
2.2.4. Advocate for continued expansion of natural gas access	CAO & Council	Medium



Goal 3: Collaboration and Partnerships

3.1. Priority Objective: Maximize shared services and resources

Action	Responsible	Timeline
3.1.1. Explore formal and informal opportunities to collaborate for expanded service delivery, reduced cost, and improved community benefit	CAO & Senior Management	Short to Medium
3.1.2. Secure alternative revenue sources to fund new infrastructure and other services through cost-share opportunities with neighbour municipalities and others	CAO & Senior Management	Medium

3.2. Priority Objective: Utilize partnerships to advance priorities

Action	Responsible	Timeline
3.2.1. Seek support from senior levels of government for funding, policy change and other community improvements through alliances with neighbour municipalities, Bruce County and First Nations	Council & CAO	Long
3.2.2. Build relationships with community groups to explore potential collaboration and/or outsourcing of local programs and services	CAO & Senior Management	Medium
3.2.3. Monitor, report and evaluate progress and outcomes by assigning representatives to each partnership effort	Council & CAO	Short



Goal 4: Healthy, Vibrant and Safe Communities

4.1. Priority Objective: Enhance facilities for healthy living and affordable recreational and cultural opportunities

Action	Responsible	Timeline
4.1.1. Undertake a feasibility study for the development of a community recreational hub and municipal administrative office	Council & CAO	Medium
4.1.2. Develop a master plan and cost-benefit analysis for improvements and private-public investments at Bluewater Park including connections to a multi-use trail network linking many towns and hamlets	CAO & Senior Management	Medium
4.1.3. Develop a citizen resource centre focused on community wellbeing through enhanced opportunities for neighbourhood and downtown vibrancy, active living, citizen engagement, welcoming new residents, and volunteer commitment	CAO & Senior Management	Short
4.1.4. Utilize regional alliances to advocate senior levels of government for improved access to affordable housing, health care, public transportation, and education	Council & CAO	Medium



Goal 5: Stable Economy

5.1. Priority Objective: Attract and retain business investment

Action	Responsible	Timeline
5.1.1. Create an Economic Development Strategy to assess gaps and determine priorities for business recruitment, professional services, and entrepreneurial start-ups, and to focus on sustainable year-round tourism/destination development	CAO & Businesses & Tourism Industry	Medium
5.1.2. Harness cooperation between local and regional economic development programs to keep and grow business and labour force talent	CAO & Senior Management	Medium

5.2. Priority Objective: Inspire public confidence in municipal services

Action	Responsible	Timeline
5.2.1. Establish expedited customer service protocols and implement new technologies to improve processing of applications and permits	CAO & Senior Management	Short
5.2.2. Establish a customer relationship management (CRM) system to improve external public relations	CAO & Senior Management	Short
5.2.3. Establish an economic recovery response program for local business community	CAO & Senior Management	Short



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Implementation and Monitoring

What does Implementation mean?

The actions identified in the Corporate Strategic Plan are high-priority operational initiatives undertaken by staff of the Town of South Bruce Peninsula. Some will take longer than others to complete, but every Department should realign its Business Plan to make the priority actions a reality. New tasks will appear in Department Business Plans, some requesting new funding, others necessitating the reallocation of resources. Some actions may be at the sole discretion of Management to ensure they proceed; others will need approval from Council to move forward. In all cases, implementation requires bravery, because it can be very difficult to move away from a predictable, established pattern of behaviour. True commitment to the Corporate Strategic Plan requires a mindful understanding of the course that has been set, and a tenacity to make the sacrifices and leaps of faith to get there.

Scoring New Priorities

The priority actions outlined in this Strategy are top-of-mind in fall 2020. As time passes, other new projects, challenges and opportunities will present themselves. Council and Management should be prepared to rank those additional initiatives within the context of the Corporate Strategic Plan. A decision tree, score card (see Figure 1) or checklist can be helpful to prioritize those new actions.

Figure 1: Sample Score Card

New Initiative Score Card Examples	New Initiative supports Goals in Corporate Strategic Plan								
	Statutory Requirement	Council Approval	Budget Available	Transparent/ Accountable Governance	Sustainable Infrastructure	Collaboration /Partnerships	Healthy, Vibrant, Safe Communities	Stable Economy	Total Score
Expanded Dog Park in collaboration with Service Club	0	0	0	0	0	1	1	0	2
Building Department Customer Management System	1	1	1	1	0	1	0	1	6



Monitoring

It is recommended that the Town of South Bruce Peninsula monitor progress on the Corporate Strategic Plan annually, preferably in advance of the budget review process. A key element of monitoring progress on implementation is the identification of performance metrics that offer an evidence-based assessment of the outcomes and impact of the strategic actions. Performance metrics provide a consistent framework to evaluate the following:

- Did we achieve what we set out to do?
- Did our efforts have the desired impact?
- Are we closer to achieving our strategic goals because of these efforts?

Performance Metrics

The use of performance measures in local government is driven by increased citizen demands for government accountability, greater interest on the part of local legislators in performance related information to assist in program evaluation and resource allocation decisions, and the efforts of various organizations and professional associations to make governments more results-oriented.

Performance metrics allow for an evaluation of tactics and strategies that support efficient and effective planning and resource allocation. They are a diagnostic tool that focus on energy, attention and effort. They also help to support the Municipality's commitment to accountability and transparency. Like any tool, the spectrum of sophistication is broad, for a variety of reasons.

It is recommended that the Town of South Bruce Peninsula carefully construct a performance measurement system that includes detailed and appropriate metrics for each of the Corporate Strategy Goals. This could be structured to utilize existing measures, and the creation of other metrics to effectively measure new initiatives.

A "report card" shared during the annual Strategy Review would be the principle means of reporting back to Council and the community on the Strategic Plan performance measures. A system that feeds directly into the Departmental Business Plans is suggested, to ensure there is consistent measurement between the day-to-day actions and tactics, and the strategic planning framework.

Basic Metrics

A basic performance metric could be a statement grounded in an internal, informal assessment of a project's progress. As part of the monitoring report, the outcome could be measured as a percentage of progress towards an action being completed.

- Example: **Analysis of Asset Management Plan: 80% complete**



Another basic example is the use of colour codes: Green may indicate the project is complete or nearing completion. Yellow could mean there are obstacles or resource issues. Red could mean the project has stalled or was abandoned. See Figure 2 for an example from another municipality.

Figure 2: Example of Strategy Monitoring Report

Status	#	Ongoing Action	Comments	Lead
☑	5.1.9	Expanded online events calendar	Completed February 1, 2012	NC
☑	5.2.2	Cultural/community asset mapping	Heritage & Culture launched online map with cultural assets	NC
☑	5.1.11	Continue regional tourism work	Positive relationship with SWOTC	Multiple
1	5.2.4	Maximize joint work with arts/heritage		Multiple
1	5.4.1	Solutions-focused small business forum	Workshops ongoing, monthly Development Open Houses; quarterly joint meetings with business groups	Multiple
☑	5.1.6	Grow online tourism presence		NC
☑	5.1.7	Continue social media presence	Ongoing on several channels	NC
3	5.2.1	Create arts council	Heritage & Culture exploring options	Multiple
3	5.4.4	Develop innovation/entrepreneur centre	Could be part of Community Hub idea	Multiple
☑	5.1.2	Support Tourism Ec Dev Advisory Board	Wording added to OPR	NC
1	5.2.5	Support creative economy in Official Plan	Arts & Culture wording added to OPR	NC
4	5.3.1	Support local green energy projects	Green Energy Hub alliance terminated	Multiple
1	5.4.2	Update home-based business policies	Subject to completion of ZBL/OPR	NC
4	5.3.2/5.3.3	Support green energy regional focus	Green Energy Hub alliance terminated	Multiple

☑ Complete 1 Underway 2 Challenged 3 Exploring Options 4 Not Proceeding

Complex Metrics

Municipalities can use more sophisticated tools for corporate performance measurement. These tools come in various forms and will require much more staff time to coordinate a reporting structure. Financial Information Reporting (FIR) data filed with the Province of Ontario by every municipality may provide a framework for performance metrics. The WCCD Global Cities Registry also provides the highest standard of community performance monitoring, in the form of ISO certification.



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