A People Place, A Change of Pace
SHELBURNE
ONTARIO, CANADA

Meeting Date:	Monday, October 07, 2019
To:	Mayor Mills and Members of Council
From:	**Denyse Morrissey, Chief Administrative Officer**
Report:	CAO 2019-10
Subject:	**Council's Strategic Priorities 2019-2022: General Update and Adoption**

Recommendation

Be it Resolved that Council of the Town of Shelburne:

1. Receive report CAO 2019-10 "Council's Strategic Priorities 2019-2022: General Update and Adoption" for information; and that
2. Mission - To be an engaged, connected and innovative community be approved; and that
3. Vision - To build a strong, vibrant community, honour our heritage and celebrate our diversity be approved; and that
4. Values – Innovative, Respect, Integrity, Engaged and Community be approved; and that
5. Goals - Sustainable, Engaged and Livable be approved; and that
6. Targets (a total of 12) within each of the three Goals be approved.

Background

The Town of Shelburne Council has placed significant importance on developing strategic priorities to guide their term of office. This is the first time a Council has developed their own strategic priorities and plan. Council's Strategic Priorities is a blueprint for how Council will make thoughtful decisions about the Town's future to ensure its success.

A general summary of the process to date was summarized in the March 11, 2019 staff report CAO2019-04 "Council's Strategic Plan 2019-2022 General Update" and is provided in Appendix 1.

Due to a significant number of other projects and initiatives which included the review of policing services for the Town, the original timelines targeted for the finalization and Council's approval of the strategic priorities has been delayed.

Council again met on September 11, 2019 and this session was led by the facilitator. Senior staff also participated in the session. The organizational chart, as of January 2019, was recirculated at this session and is provided in Appendix 2.

The purpose of the session was to review the Strategic Priorities and determine if any new issues or challenges had arisen in the past six months had any or no impact on the original goals and targets, and if such impacts would require the plans to be adapted, realigned, adjusted or condensed. Council also considered the draft target list and should anything be either deferred or amalgamated within existing target(s).

It was outlined that the purpose of the session was not to identify an operation plan or detailed activities of the key performance indicators that would be required. The creation of an operational plan, timelines and the evaluation of the associated costs would be a next step and a responsibility of staff.

The session guideline by the facilitator included:

- That Council through this initiative is supporting a balanced approach and one that is pro-active
- Strategic Priorities are an important means to reduce a reactive approach when responding to requests and expectations
- That the goals and targets identified by Council must also be achievable
- They are a reflection of Council's commitment to fund those things that align with their priorities
- There must be a match between the goals and targets with the staffing resources to implement the many directives from Council to staff
- There will be annual and multi-year associated financial (which implies taxation to fund) costs to implement and achieve many of the goals and targets

The Mission, Vision, and Values and Goals which Council developed for The Town of Shelburne in February 2019 did not change.

The role of Vision, Mission and Values are summarized:

- ❖ Our VISION guides the Town.
- ❖ Our MISSION is what we do.
- ❖ Our VALUES are our core beliefs that underpin our activities.

VISION

- ➢ To be an engaged, connected and innovative community.

MISSION

- ➢ To build a strong, vibrant community, honour our heritage and celebrate our diversity.

VALUES (in no particular order)

- ➢ Innovative
- ➢ Respect
- ➢ Integrity
- ➢ Engaged
- ➢ Community

Council's Goals which are what they want the Town of Shelburne to be known for, reflect and represent are, and the acronym is "SEL":

- ❖ Sustainable
- ❖ Engaged
- ❖ Livable

TARGETS AND KEY PERFORMANCE INDICATORS

Council reviewed the Targets and Key Performance Indicators (KPIs) that had been developed in February 2019 to prioritize (or re-prioritize) their targets for the remainder of their term or about three years.

Council also reviewed and incorporated the inputs from the March 20, 2019 community session and the online engagement. The March 20, 2019 session information is provided in Appendix 3. General comments from the on-line engagement which was open from mid April to mid May 2019 is provided in Appendix 4.

The Targets within each Goal are summarized:

SUSTAINABLE GOALS

Four (4) Targets:

      T1   Develop long term (10 – 15 year) financial plan
      T2   Municipal services review and evaluation
      T3   Invest and fund critical infrastructure for future
      T4   Promote balanced growth

ENGAGED GOALS

Four (4) Targets:

      T5   Improve technology
      T6   Promote more open communication
      T7   Promote partnerships and collaboration
      T8   Enhance marketing and education

LIVABLE GOALS

Four (4) Targets

      T9   Promote age-friendly, multicultural community
      T10   Improve and enhance parks and recreation services
      T11   Improve community connections
      T12   Support and celebrate arts and culture

Within each Target, Key Performance Indicators (KPIs)were developed by Council.

SUSTAINABLE Targets and Key Performance Indicators

<u>Target T1</u>   <u>Develop long term (10 – 15 year) financial plan.</u>

KPIs:

  A. Long Term Financial Plan completed and adopted

Target T2   Municipal services review and evaluation

KPIs:

A. Complete a service delivery review for all Town services and operations

B. Complete review of municipal services delivered by third-party boards and complete a governance review

Target T3   Invest in critical infrastructure for future

KPIs:

A. Infrastructure plan evaluation completed

B. Continue development of long term capital plan/asset management

C. Commit to funding critical infrastructure

Target T4   Promote balanced growth

KPIs:

A. Increase business sector - retail, commercial and industrial

B. Achieve more diversified residential housing; focus on affordable housing, rentals, and lower income housing

C. Protection of natural areas through existing lands or acquisition

ENGAGED Targets and Key Performance Indicators

Target T5   Improve technology

KPIs:

A. Complete continual assessment, evaluation and updating of the new Town website and social media platforms

B. Implement live streaming of Council meetings and monitor

Target T6   Promote more open communication

KPIs:

A. Develop plans and strategies to better support ongoing access to information for residents, community engagement, and how information is provided

B. Develop a new corporate communications strategy to support the diverse communications needs of the Town

C. Implement a new customer service strategy

Target T7   Promote partnerships and collaboration

KPIs:

A. Expand community partnerships with not for profits, sport organizations and service clubs

B. Enhance collaboration with youth

C. Expand collaboration with developers and business'

Target T8   Enhance marketing and education

KPIs:

A. Increase measurements of online use and data collection

B. Increase Town response times, reactions to, and awareness of community concerns and opinions

C. Expand the use of community on-line engagement tools and increase engagement and interaction with the community

LIVABLE Targets and Key Performance Indicators

<u>Target T9</u>   <u>Promote age-friendly, multicultural community</u>

KPIs:

    A. Increase the variety of amenities and services provided that are accessible

    B. Complete evaluation and analysis related to the demographics of Shelburne in responding and adapting to service needs

<u>Target T10</u>   <u>Improve and enhance parks and recreation services</u>

KPIs:

    A. Complete a Master Plan for Fiddle Park

    B. Expand, increase and improve outdoor and indoor recreation and parks opportunities

    C. Implementation of a parks and recreation task force

    D. Complete a new Parks and Recreation Master Plan

    E. Protect our local and natural environment

<u>Target T11</u>   <u>Improve community connections</u>

KPIs:

    A. Achieve decreased heavy truck traffic

    B. Improve walkability and safety

    C. Increase number and kilometres of connected walking and recreational cycling trails

    D. Increase on road cycling opportunities

    E. Increase wayfinding and directional signage throughout Town

    F. Access to local and regional transit or alternative transportation options achieved

Target T12   Support and celebrate arts and culture

KPIs:

A. New Arts and Culture committee established and functioning

B. Complete master plan or feasibility study for Grace Tipling Hall to achieve better utilization and increased revenues

C. Evaluate the role of community and special events in supporting and enhancing arts and culture

D. Complete feasibility review/study for a new art gallery

Financial Impact

The approximate costs of $10,500 associated with the project are within the 2019 Council budget. These costs were offset by a transfer from the election reserve of $7,000.

Staff will need to develop the implementation plan, timelines and the corresponding estimated costs for the Key Performance Indicators within each Target. These will be provided for the consideration of Council as part of the annual draft budget starting in 2020.

It is anticipated that projects costs have multi-year budget impacts. It is anticipated there will be significant costs associated with the Targets.

Policies & Implications

Not applicable.

Consultation and Communications

Community consultation included an engagement session held on March 20, 2019. Approximately 25 people attended. On-line engagement was open from early April to mid May 2019 and 10 people provided input.

Information was also shared and promoted using our web site, and social media platforms including Facebook, Twitter and Instagram.

Council's strategic priorities, with adoption, will be marketed and shared using our web site and all social media platforms.

The report template for staff reports will also be revised to include a new section called Council's Strategic Priorities. This will indicate how the report supports the mission, vision and values of the Town of Shelburne as well how

the report addresses the goals and targets set out in Council's Strategic Priorities.

Supporting Documentation

Appendix 1   CAO2019-04 "Council's Strategic Plan 2019-2022 General Update", March 11, 2019.

Appendix 2   Town of Shelburne organizational chart, January 2019.

Appendix 3   Community consultation session, March 20, 2019 for Council's Strategic Priorities.

Appendix 4   General comments from the April-May 2019 on-line engagement.

Respectfully Submitted:

Denyse Morrissey, CAO

A People Place, A Change of Pace

SHELBURNE
ONTARIO, CANADA

Meeting Date:	Monday, March 11, 2019
To:	Mayor Mills and Members of Council
From:	**Denyse Morrissey, Chief Administrative Officer**
Report:	CAO 2019-04
Subject:	**Council's Strategic Plan 2019-2022: General Update**

Recommendation

Be it Resolved that Council of the Town of Shelburne:

Receive report CAO 2019-04 "Council's Strategic Plan 2019-2022: General Update" for information.

Background

The Town of Shelburne Council has placed significant importance on developing a strategic plan to guide their term of office during 2019-2022. This is the first time a Council has developed their own strategic priorities and plan. Council's Strategic Plan is a blueprint for how Council will make thoughtful decisions about the Town's future to ensure its success.

Council participated in full day strategic planning sessions held at the New Horizons Seniors Centre, Dufferin Oaks on January 16, 2019 and February 6, 2019. The sessions were led by a facilitator and senior staff were in attendance and participated.

The facilitator also outlined why strategic priorities and a plan is essential and that strategy is about choice. It serves as a roadmap to effectiveness and guides the Town. Strategic priorities will set the direction for the activities of the Town or an organization, provide a foundation for decision

making, provide a focus on activities that are undertaken especially when we operate in an environment of limited resources. Peter Drucker was also quoted by the facilitator "There is nothing so useless as doing efficiently that which should not be done at all'.

The draft goals and targets which Council developed at their two sessions will be presented to the community for their input on March 20, 2019. This community consultation session will be held at the CDRC from 7 pm to 8:30 pm. The community will also be able to provide input through our online engagement tool 'Bang The Table". This on-line component of the community consultation is expected to commence in early April 2019.

Analysis

The role of Vision, Mission and Values was presented by the facilitator:

- ❖ Our VISION guides the Town.
- ❖ Our MISSION is what we do.
- ❖ Our VALUES are our core beliefs that underpin our activities.

Council developed the following for The Town of Shelburne:

VISION

➢ To be an engaged, connected and innovative community.

MISSION

➢ To build a strong, vibrant community, honour our heritage and celebrate our diversity.

VALUES (in no particular order)

➢ Innovative
➢ Respect
➢ Integrity
➢ Engaged
➢ Community

Council also developed their Goals which is what they want the Town of Shelburne to be known for, reflect and represent. They also developed Targets for each Goal:

- ❖ Sustainable
- ❖ Engaged
- ❖ Livable

SUSTAINABLE GOALS

Targets:

- ➢ Develop long term (10 – 15 year) financial plan.
- ➢ Infrastructure plan evaluation
- ➢ Invest in critical infrastructure for future
- ➢ Promote balanced growth
- ➢ Protect and conserve the natural environment
- ➢ Municipal services review and evaluation

ENGAGED GOALS

Targets:

- ➢ Improve technology.
- ➢ Promote more open communication.
- ➢ Promote partnerships and collaboration
- ➢ Enhance marketing and education

LIVABLE GOALS

Targets

- ➢ Promote age-friendly, multicultural community
- ➢ Improve and enhance parks and recreation services
- ➢ Improve community connections
- ➢ Support and celebrate arts and culture

Key performance indicators (KPIs) for each target were also listed by Council. A summary of that information and the development of action items for each Target with recommended timelines for each KPI is being completed by staff and is in progress.

Council also identified that a review and the evaluation of our current logo(s), images, and brand would be beneficial. This review would include community consultation.

Financial Impact

The $9,450 costs associated with the project were included in the 2019 Council budget. These costs were offset by a transfer from the election reserve of $7,000.

Policies & Implications

Not applicable.

Consultation and Communications

Community consultation through a community session and on-line engagement.

Information will also be shared and promoted using our web site, and social media platforms including Facebook, twitter and Instagram.
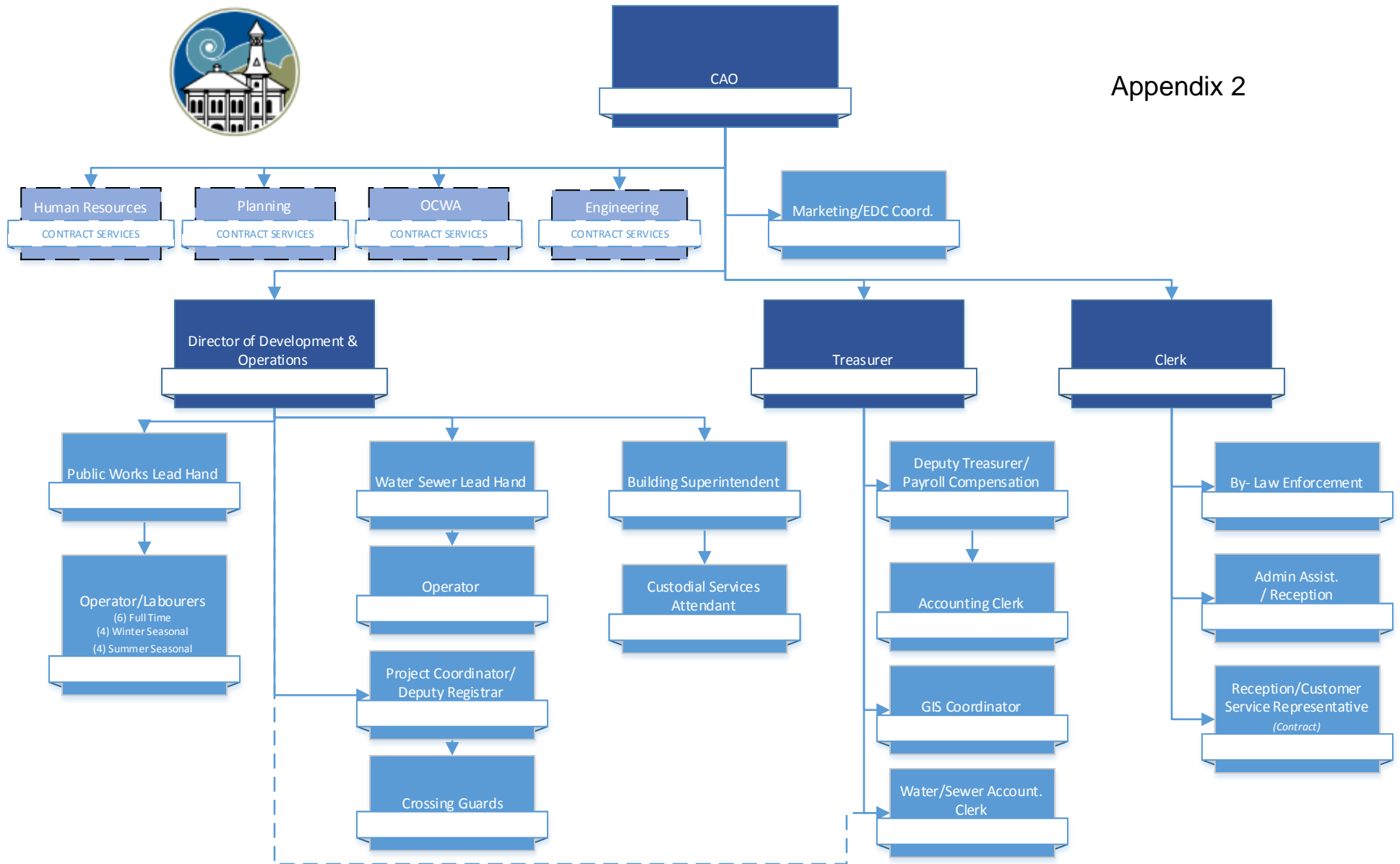
Supporting Documentation

Not applicable.

Respectfully Submitted:

Denyse Morrissey, CAO

ORGANIZATIONAL CHART – JANUARY 2019

Appendix 2

CAO

- **Human Resources** — CONTRACT SERVICES
- **Planning** — CONTRACT SERVICES
- **OCWA** — CONTRACT SERVICES
- **Engineering** — CONTRACT SERVICES
- **Marketing/EDC Coord.**

Director of Development & Operations

- **Public Works Lead Hand**
  - **Operator/Labourers**
    (6) Full Time
    (4) Winter Seasonal
    (4) Summer Seasonal
- **Water Sewer Lead Hand**
  - **Operator**
  - **Project Coordinator/ Deputy Registrar**
    - **Crossing Guards**
- **Building Superintendent**
  - **Custodial Services Attendant**

Treasurer

- **Deputy Treasurer/ Payroll Compensation**
  - **Accounting Clerk**
- **GIS Coordinator**
- **Water/Sewer Account. Clerk**

Clerk

- **By- Law Enforcement**
- **Admin Assist. / Reception**
- **Reception/Customer Service Representative**
  (Contract)

LEGEND:
- - - - Indirect reporting relationship

| SENIOR MANAGEMENT POSITION | REGULAR POSITION | CONTRACT SERVICES |

Vision		Values		Mission	
To be an engaged, connected, and innovative community.		**Innovative, respect, integrity, engaged community**		**To build a strong vibrant community, honor our heritage and celebrate**	

Comments	Comments	Comments
Yes	Yes	Yes
Yes	Like	Yes
Yes	Yes	Yes
Yes	Yes	Like
Like	Need more	Yes
Like	Like	Like
Like	I like them all	Yes
Like	If no particular order then why not alphabetic. This order implies priority	Yes
Like	Yes	Like
Yes	Yes	Like
Yes	Yes	Yes
I like it	Like	Like
Yes	Like	Yes
Yes		Yes
yes		I like it
		Yes

Infrastructure plan evaluation	Invest in critical infrastructure for future	Municipal services review and evaluation	Protect and conserve the natural environment	Develop long term financial plan	Promote balanced growth
Public transport system	Better medical center with more facilities	Go train	Clean up the heritage lanes, some people have garbage in the backyards	Bring in more business / industry	Revitalize downtown
Wider road (Hwy 10)	Better recreation facilities (indoor pool), Basketball court / tennis	Go bus	Buy - in from the companies	Focus on putting money into reserves for future expenses	Specialty shops - cholate, cheese, butcher
Better transport options (go transit, uber)	Clean up the downtown	Local transit to Orangeville	Promote the walking trails some are soggy	Applying for available grants	More festivals
Street lights	A plan to avoid truck ploughing through the down town core	More garbage pails for dog poop	Protect Besley drain	Require more assistance from province	More trees
	Better drainage	Catholic School Board	Bans on single use plastics	Reduce debit load	More shopping
	Permeable driveway technology for parking areas (less mud)	Co Operate between OPP and local force - cannot afford new building	More garbage pails around town		Recreation and shopping
	Invest in reserves	Indoor pool	Educate the classes (school)		Incentives for new home buyers
	Putting money in reserves	Truck by-pass	More drainage for water / ice		More facilities for families (jobs, retail, new business)
	Sewer update	Police services	Community clean up day		High schools capacity?
	Planting more trees in open areas to reduce the amount of snow blown on the roads	Someone to oversea recreation in our community			Provide more health care
	By pass	Public transit			Examine where your shortfalls are for your citizens
		Keep the police			Student engagement mentoring
					Youth center that promotes arts and theater
					Need more healthcare in the community
					Mail order - use existing platforms
					Youth recreation center
					Variety - Arts & music
					More healthcare in community
					More stores (not box stores)
					Community services
					Bigger lots
					More amenities
					More industries
					Incentives for industrials / business to move in area
					Industry
					Transportation
					Shops open in the evening

Improve technology	Promote partnerships and collaboration	Enhance marketing and education	Promote more open communication
Learn from our youth - the can turn our ideas into realities	Engaging with county council	Plans to market and expose Shelburne to more industries and companies to create jobs.	Provide local news and developments on website
Post surveys on Town website	Higher education access (Humber)	Create own surveys - Survey monkey can residents / business post to Town	More Town information on website - New businesses - programs
More community information on website	Skills improvement update options	Push notifications - invites, twitter, Instagram	All ages collaboration
Use of internet more and increase broadband / highspeed in area	Groups like the YMCA / partner	Easy assessible information on the website i.e. what's happening in Shelburne this week	Community picnics
More online services	Offer a variety of special interest classes in the community	Offer a continuing education program	Service clubs
Promote youth entrepreneur	Community gardens	Promote businesses to Shelburne	Town partnerships
Entrepreneurship initiatives	Community theater	Better / reliable media services (Bell/Rogers, WIFI centers)	Continue more communication with citizens
Funding and sponsorships for youth programs	Small businesses and enterprises development	Update website to promote city	More surveys
	Create connections with local municipalities		Promote on local radio stations
	Communicate thru town website / newsletter for new residents about groups like Kinnettes, Lions, Rotary etc......		Newsletter info night
	Mentoring program at high school that local professionals / trade people / retail owners can promote their careers		Meet the rep night
	Partner with recycling company to reduce waste		More meet and greets
			Market the resources available to residents especially the youth our personal growth and entrepreneur
			Community participation info session
			Push notifications, twitter, Instagram
			Newsletter information sessions
			Meet and Greets
			Use of technology. Towns webpage
			More public information sessions
			More awareness on events in the community (newspaper, signage electric)

Livable Goals
Ideas and Suggestions

Improve and enhance parks and recreation services	Support and celebrate arts and culture	Improve community connections	Promote age - friendly, multicultural community
Promote more family friendly events	Enhance the already vibrant history and culture of Shelburne (facelift to town)	Bands in the park	What do people want? Focus group
Dog park	Community Theater for all ages	Rib fest	Recognize the diverse community have festivals/activities
Develop Fiddle Park with trees, trails and a pond	Offer classes, sessions, activities	Access to other community features and better fees	Offer educational sessions/clubs for new comers / existing residence
Dog park	Movies in the park / Grace Tipling expand entertainment, juried art show	Bands / open shows	Better community parks with activities
More rec services, offer computer classes, sewing, Zumba etc. Things for senior, youth and adults	Promote art gallery at Grace Tipling Hall	Community picnics	Cultural day celebration in the summers
Develop bike trails	Community Theater	Recognize volunteers	Community parks
Develop bike lanes	Walking tours of historic downtown	Open road lanes	Indoor pools
Develop bike shares	I frequently check the community calendar online	People taking initiative	More diversity in food / restaurants
More activities, sports, parks	Art in the park event	Churches	Have multi cultural days in school to celebrate different cultures
Dog park	Promote and support high school plays	Partner with guides, cadets to help with activities	
Dog park	Being more multi cultural now - Use Grace Tipling Hall to promote culture	Senior center with activities	
More garbage cans			
Indoor pool with senior and youth programs all year round			
Connect walking trails and mark them			
Rotate and bring new sports and activities rathe than just baseball and soccer			

Appendix 4 - CAO 2019-10 "Council's Strategic Priorities 2019-2022: General Update and Adoption"

Town of Shelburne, On Line Engagement April and May 2019
General Comments – Council Strategic Priorities 2019-2022

Anonymous
4/09/2019 03:47 PM
Honoring our heritage is enough

Anonymous
4/09/2019 07:08 PM
I'm all for celebrating diversity as long as we make an emphasis to celebrate being Canadian and making that a priority as well

Anonymous
4/09/2019 03:47 PM
Honoring our heritage is enough

Anonymous
4/09/2019 07:08 PM
I'm all for celebrating diversity as long as we make an emphasis to celebrate being Canadian and making that a priority as welling Canadian and making that a priority as well

Anonymous
4/09/2019 07:08 PM
Council should approach Dufferin County about partnering to build a facility in Shelburne that will house Shelburne Police and the Provincial Offences Office. Dufferin County is looking to take over operations of it from the Town of Caledon and are making a proposal to The ministry. Many Police and court facilities are attached to each other and it makes sense to have the court here since it's in the middle of Dufferin County.

Anonymous
4/13/2019 11:03 AM
Partnerships should include cultural and heritage councils. Connect with other Ontario towns (close to ours in population/size). Find out what they are doing right.

Anonymous
4/10/2019 11:25 AM
Lots of events in town. Maybe good to see or hear from council during the events. Change the webpage so it easier to find things within the community. Advertise events better on this page

Anonymous
4/10/2019 11:25 AM
Maybe survey with for the people to help evaluate. This way you have an idea of what people think or find are issues and you can build from there

Anonymous
4/13/2019 11:03 AM
I don't know what exactly is involved in executing this but it definitely needs to be done. Stop allowing developers to build without considering the impact on infrastructure (roads, traffic, parking)!

Anonymous
4/09/2019 07:08 PM
Builders want to keep building here. Why can't the Town make it part of the agreement. You want to build here then you need to put a certain amount over and above the fees now to improve infrastructure

Anonymous
4/13/2019 11:03 AM
Needs to be done. Again, looking at comparable towns where this has been done successfully. Find out what what people think or find are issues and you can build from there

Anonymous
4/09/2019 03:47 PM
Stop the building houses and let the town catch up

Anonymous
4/13/2019 11:03 AM
Stop building without considering the impact on resources, infrastructure, roads, the community. Do the proper planning first! Maintain the character and appearance (Heritage). This is not being done currently. Saying no to any and all development is needed at some point.

Anonymous
4/13/2019 11:03 AM
Stop bulldozing and paving over it! At some point, you have to stop!

Anonymous
4/09/2019 03:47 PM
Have local groups like Sparks Cubs Girl Guides help maintain the parks
Flowers

Anonymous
4/09/2019 07:08 PM
An improved recreation centre, we not only have to commute every day to
work but now we commute on the weekends for swimming, gymnastics etc.

Anonymous
4/10/2019 11:25 AM
It would be nice to have an indoor pool. Residents would not have to travel
to Orangeville Splash pad at a park. Alder arena offers fitness classes as
well. Kids and families. Be nice to have things in town so we do not have to
travel elsewhere

Anonymous
4/13/2019 11:03 AM
A wish list item would be an indoor recreational pool and fitness centre

Anonymous
4/10/2019 11:25 AM
Maybe do more advertising on webpage or social media. Get the different
community clubs involved and provide updates what they are doing.
Advertise how people can get involved.

Anonymous
4/13/2019 11:03 AM
A ride share service might allow for connectivity where there is no public
transit available. Sending out flyers to promote community events. (Again,
not everyone is on Facebook) Promote town and community meetings more
clearly on the town of Shelburne website. Keep it up to date.

Anonymous
4/13/2019 11:03 AM
Utilize popular publications like In the Hills Magazine to promote events
more dynamically. Eg. Why not a Shelburne page in this mag? Orangeville,
Erin, etc., do it. Hire a promoter for the Heritage Music Festival.