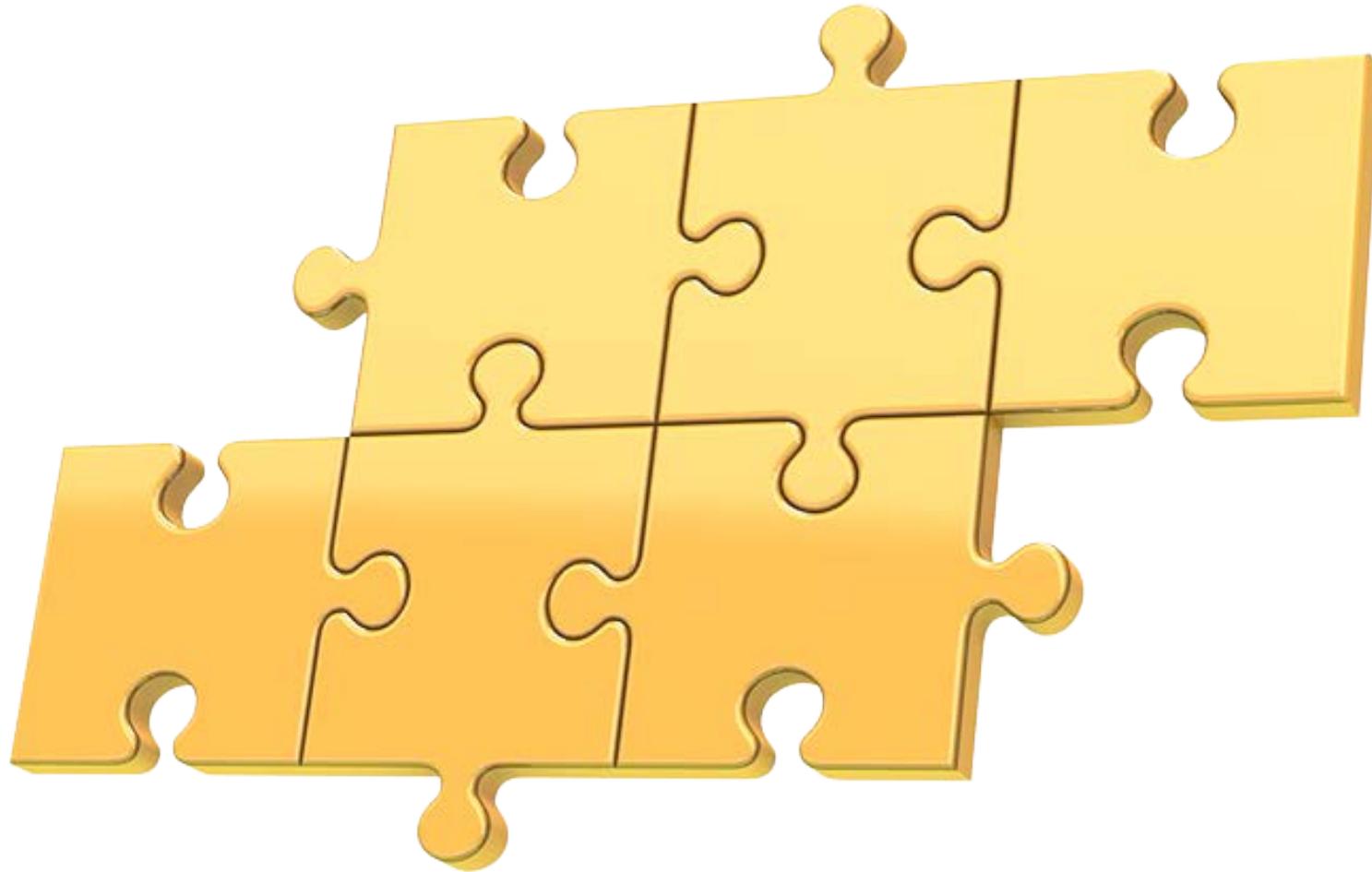


Town of Erin

2015-2020 Corporate Strategic Plan (Draft Document)

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## **INTRODUCTION**

### **Why Do a Strategic Plan?**

The Corporate Strategic Planning process is an important one because it enables an organization to examine key operational issues within the broader context of the whole organization. It assesses specific issues and permits the determination of strategic priorities and in turn the development of strategic activities to help strengthen or further align existing activities. Synergistic opportunities can also be found when a corporate-wide examination of issues is undertaken during a strategic planning process. Solutions to these issues may combine to strengthen more than one area of an operation.

It is also important to understand what a Strategic Plan will do and what it will not do within the municipal context.

A strategic plan is an organizational plan. It aligns the organization's Vision Statement, Values and Mission Statement with specific and related business activities that will support the fulfillment of the Vision, Values and Mission. It provides a framework for how the municipality should go about doing the work of the municipality. It is not however, a land planning document or a water wastewater planning and implementation document. It will however, provide a context within which these activities may be further examined and related work planned.

A Strategic Plan also helps to define the philosophical priorities of an organization. By engaging key stakeholders in discussions about the corporate Vision, Values and Mission Statement, the plan further defines

the priorities for the Town's business. By exclusion, it also helps to define and provide a screening process to "filter out" activities which are not deemed to be priorities of the Corporation. By identifying key Strategic Priorities, a framework now is developed to be used as a "check and balance" during decision-making processes. It ensures that the allocation of resources such as finances, staff time, equipment and other cost generating items are not expended in areas that have not been identified as Strategic Priorities for the corporation.

Finally, a Strategic Plan is a living document. Should a request for service arise or a new issue or idea be presented before Council, they can check the alignment with the Strategic Plan and decide if there is a need or merit in adjusting the plan. The strength of the plan will provide a solution to the request or identify another direction for the request to go in rather than adjusting the plan. It may also provide a learning moment when the strategic plan expands to accommodate a concept that is actually related to the overall effectiveness of the organization but was never realized. Accommodation is possible however, the strategic plan has a domino effect on budgets, resource allocations (staff time, \$, equipment use and timing of all tasks) so when a new task is added, implications are often quickly seen and are measureable by way of any necessary adjustments. These impacts can be positive or negative on resources and at times, a new direction can negate the need for previous resource allocations. For example, another service provider may come onto the scene or a new technology can evolve that causes a redundancy in an area of operations. This is the beauty of a strategic plan because it enables a constant and conscious assessment of the impact of change. Finally, a strategic plan enables a solid overview of current priorities, timing, resource allocations and expected outcomes. It identifies who is responsible for specific outcomes and the timelines within which tasks can reasonably, all things considered, be accomplished.

# Town of Erin

## 2015-2020 Corporate Strategic Plan (Draft Document)

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A Strategic plan outlines the following:

**WHAT** is important?

**SO WHAT** are the implications?

**NOW WHAT** do we do about it?

**WHEN** are we going to do this?

**WHO** will lead the process and

**WHAT are the RESOURCES** that will be required to implement each strategy?

A Strategic Plan is a critical support for resource allocation planning such as the development and management of a five year fiscal plan.

### **What does this mean for the Town of Erin?**

The timing of this exercise is actually quite prudent and optimal for the Town of Erin. A considerable amount of work has been done to “measure” the status/health/directional needs of some of the most significant municipal resources and cost centres. To this end, this strategic plan will likely undergo additional refinement pending the directions recommended in various plans and reviews that are underway or pending in the near future. This strategic plan outlines various strategies that can strengthen the overall operation of the Town of Erin as it tackles some significant challenges. It will also serve as a framework within which to add other

comprehensive “pieces of the puzzle” to establish a more detailed picture when other issues are aligned with the strategic priorities identified through this exercise.

**The Strategic Review Process for the Town of Erin**

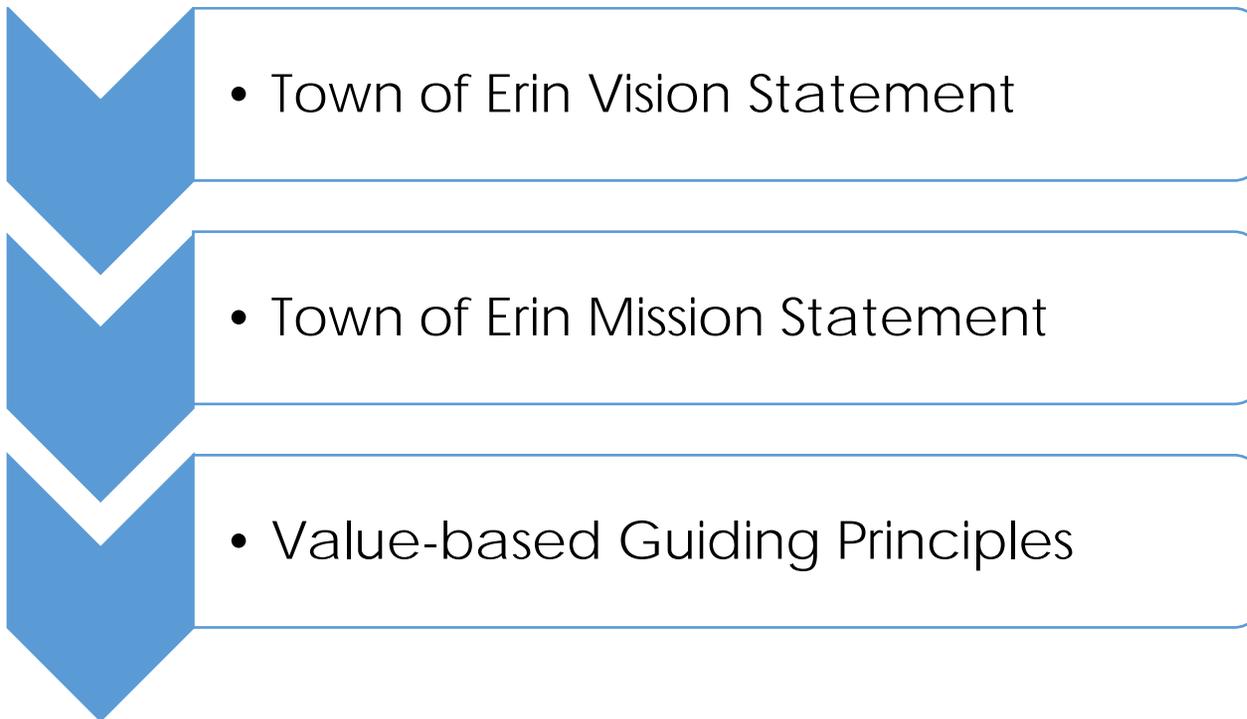
Initial work on the development of a Strategic Plan for the Town of Erin began in the Spring of 2013 and consisted of two small community meetings and a 2 day retreat with Town Council and Town Department Head Staff. A list of initial activities was generated and the process was paused due to other considerations and activities underway with the Town’s SSMP and the departure of the Town’s CAO. The summary notes of these initial activities have been considered and as deemed appropriate, aligned with other input and included in the development of this document.

The subsequent work which has resulted in the development of this draft Corporate Strategic Plan consisted of the following:

1. A review of “other” Town plans and reports generated within the past year
2. Individual meetings with all Town Department Heads
3. Individual meetings with each member of Town Council including the Mayor
4. A meeting with all Town Staff together to review initial findings on the development of emerging Strategic Priorities.
5. Meetings with a sampling of community business leaders, the Executives of Transition Erin and the Concerned Citizens of Erin, two school principals and the Executive of East Wellington Community Services. A total of over 60 hours of meetings were held

**Developing the Foundation of the Strategic Plan**

As mentioned earlier, it is important to base the plan on a Vision, a Mission Statement and a set of Value-based Guiding Principles. These become the “Philosophical Touchstones” we rely on when difficult choices must be made.



## Town of Erin Vision Statement

*The Town of Erin will remain a vibrant, safe and sustainable community, located at the headwaters of the Credit and Grand Rivers. The Town will continue to capitalize on its proximity to large urban centres, while maintaining its excellent community spirit. With a strong employment base, and a range and mix of housing, a high percentage of the residents will work and continue to live within the Town of Erin. Visitors will enjoy the small town atmosphere, unique shops and surrounding rural charm. Through responsible development and servicing, the Town's rich natural environment will be protected and preserved.*

**BM Ross, SSMP Vision Statement**

Throughout the course of many exercises, not the least of which was the extensive work on the SSMP, many variations on a Vision Statement were created. In keeping with the input from all those consulted for the development of this Strategic Plan, this statement best exemplified the feelings consistently expressed.

An additional phrase that we suggest for a "Corporate Identity Tagline" was created in the original Strategic Plan exercise was the phrase: ***Erin, where you feel naturally inspired and genuinely at home...***

## Town of Erin Mission Statement

*The Corporation of the Town of Erin, through sound fiscal management, is committed to providing the following quality municipal services:*

- *Public infrastructure including roads and Waterworks*
- *Municipal Planning*
- *Municipal Treasury and Finance*
- *Municipal Administration in accordance with related municipal bylaws, provincial and federal legislation*
- *Fire and Emergency Services*
- *Parks and Recreation Facility Management*

These are the Corporation of the Town of Erin's Core Municipal Services. They are the "must do's" according to the Municipal Act of Ontario and the prime areas of responsibility for the determination and allocation of Municipal Taxes. Because the Town of Erin is part of a two-tier government model, an allocation of tax dollars is collected to cover costs under the auspices of County delivered services as well as Board of Education services. The Town's legislated business, or core services is in fact "Mission One" for the Town. Council can deviate and use funds for other Town related business and this is where having a Strategic Plan is important.

## Town of Erin Value-based Guiding Principles

**Transparency & Integrity** We are the stewards of the public purse. We will operate in an honest, open and ethical manner within the parameters of the Municipal Act of Ontario and all related bylaws and legislation.

**Respectful Working Relationships** We work as a Team in co-supportive ways to bring out the best in one another and to enable best possible outcomes for value and quality services. We value all contributors from the Community, Staff and Council. We celebrate success and handle our differences with respect and professionalism.

**Committed to Best Practices and Quality Service** We will maintain current knowledge in our respective fields including legislation and regulatory requirements and will be pro-active to ensure standards are always measured and met. We plan and operate in ways that best serve the public interest to capitalize on opportunities while mitigating risk.

**Cost Effective & Environmentally Focused Innovation** We value creative, leading edge solutions that are tested, keep costs low, preserve our assets and protect our natural environment. We will always measure risk and strive to integrate new, cost effective innovative strategies for service delivery.

**Proactive, Timely and Prepared** We will plan our work and work our plans. We will be proactive to identify risks and ensure that Town resources and facilities are maintained, residents and visitors are safe and services are delivered in a quality, timely and effective manner.

**Collaborative Partnerships** We are a community with diverse skills and needs and we value working in public and private partnerships that share our corporate values and strengthen and support the overall quality of life for our residents and the economic viability of our Town.

The findings of this research lead to the identification of 3 "Pillars of Priority" with Key Strategic Priorities

Organizational Effectiveness	Resource Management	Community Capacity Building
<ul style="list-style-type: none"><li>• Maximizing the Effectiveness of the Municipal Administration<ul style="list-style-type: none"><li>• Effective and Efficient Corporate Management Practices</li></ul></li><li>• Corporate Resilience and Learning</li><li>• Quality Customer Service</li><li>• Building and Maintaining Strong Strategic Partnerships</li></ul>	<ul style="list-style-type: none"><li>• Corporate Financial Strength and Viability</li><li>• Infrastructure Planning and Management : Roads, Waterworks, Buildings, Equipment</li><li>• Public Safety, Fire and Emergency Services</li><li>• Environmental Stewardship, Advocacy and Protection</li></ul>	<ul style="list-style-type: none"><li>• An Engaged and Involved Community</li><li>• A Planned, Accessible and Sustainable Community<ul style="list-style-type: none"><li>• Building, Branding and Maintaining Strong Local Economies</li></ul></li><li>• A Proud Place of Heritage, Culture and the Arts</li></ul>

**Next Steps**

The Strategic Plan now provides a framework for Staff and Council to integrate and track specific Strategic Activities within each Key Strategic Priority. Through the process of consultations for this project many specific Strategic Activities have been identified and these activities will be provided to staff for this purpose. Staff are also currently reviewing a significant number of consultant reports and assessments relative to Town Services. In addition, there are close to 100 pieces of provincial legislation, acts, regulations and local and regional bylaws that for which the Town must maintain compliance. Tracking all work and planning for all eventualities can be challenging however the Strategic Plan will provide an over-arching perspective on tasks at hand. This process will also serve to identify many specific Strategic Activities that may be happening daily but are not tracked. Using the format below, staff will identify who will serve as the Lead for each Strategic Activity as well as determine appropriate Activity Tracking Timelines, reference supportive information sources and highlight budget implications.

The chart below demonstrates how this will be tracked. There will be a series of charts for each Strategic Priority listing Strategic Activities

Strategic Activity	Priority Level H /M/L	Priority Reference	Lead Person	Budget Detail where/est. cost	Timeline

Preliminary Strategic Priority Details Pillar #1 – Organizational Effectiveness:

**Maximizing the Effectiveness of the Municipal Administration**

The Town of Erin Administrative Team is comprised of a Council of four and a Mayor working effectively together with a Municipal Staff team and local citizens and interest groups, to manage the municipality and serve the needs of the citizens while in compliance with the Municipal Act of Ontario and all related bylaws, regulations and directives. Further, the Town is part of a two tier government process with the Mayor and one Ward 9 County Councillor serving on County Council. To support our municipal administration we will:

- Regularly review policies and procedures with best practices in other municipal settings to mitigate risk and ensure efficient and effective service delivery
- Work together to ensure a positive corporate culture prevails. Staff and Council will work as a team to support successful outcomes for the Town. Differences will be handled professionally and respectfully.
- Nurture a “One Team” concept with Our Community, Our local and County Council and Our Staff.
- Maximize the value and impact of Ad Hoc and Core Committees of Council recognizing and respecting the value of input and involvement on the part of volunteers, staff and Council
- Conduct an Organization Wide Operational Review to seek efficiencies, opportunities for synergies and to assess viability of services
- Develop processes for staff evaluation, succession planning, training and HR Optimization

### **Effective and Efficient Corporate Management Practices**

Corporate activities/expenditures are included in a structured planning process and based on alignment with our Vision, Mission and Guiding Principles

- Decisions are evidence-based and congruent with community needs, legislative, regulatory and bylaw compliance directives
- New and unforeseen proposed activities and expenditures will be assessed based on alignment with the Town's Strategic Priorities prior to action.

### **Corporate Resilience and Learning**

The Town values an informed Council and Staff. Opportunities to maintain knowledge and skill are a priority.

- We are committed to being a Learning Organization and as such support training staff, Council and community volunteers to enable excellence in all Town related services and supports
- A required skill-set assessment will be completed for all positions and a Learning Plan created
- A timely and specific Orientation and Team Building Session will be designed and facilitated for the new Town Council by the end of 2014
- Whenever cost effective and appropriate volunteers and business leaders from the community will be integrated into Corporate Learning Activities
- We are committed to working with our clients to facilitate an understanding of legislation, regulations and bylaws applying to each situation.

### **Quality Customer Service**

We are committed to providing quality customer service in our working relationships with the Ratepayers of the Town of Erin as well as those who conduct business with the Town. We will maintain and provide:

- Proactive and professional services
- Responsive and communicative services
- Polite, respectful, timely quality service
- Staff have completed a Customer Service and Team Synergy Training program and have participated in the creation of a Customer Service Commitment Statement that will be posted on the Town's website and in the Town Hall.
- A One Team customer focus will be established
- Strategic Activities will include upgrade public awareness through the Town's website, municipal offices and facilities as well as implementation of the Hubzio to enhance public awareness of Town services, public weather warnings and other pertinent information.

### **Building and Maintaining Strong Strategic Partnerships**

As a municipality, we work with many partners and are committed to acting in a professional and collaborative manner to ensure positive and enhanced outcomes whenever possible. Our partners include but are not limited to:

- Various levels of government – County, Provincial and Federal as well as government agencies including Conservation Authorities and Public Health Departments
- Local businesses, educational institutions, Police, Emergency and Medical Services
- Community service groups and volunteers

- Community interest groups
- Community sport, recreation and cultural groups

### Preliminary Strategic Priority Details Pillar #2 - Resource Management:

#### **Corporate Financial Strength and Viability**

Whenever possible, best practices are in place in all areas of Town operations and service to maximize the resources we have, mitigate risk of losses and ensure new initiatives meet with strict standards for quality and value

- We plan for the future by assessing community needs, establishing priorities to meet the financial needs to sustain Town operations and quality customer service.
- Identify any non-core services and determine alternative funding processes
- Ensure that all expenditures are related to Core Town Services and any decisions to deviate must be vetted through a strategic values exercise to ensure that they are aligned with strategic directions and that the Town has the financial means, skills and infrastructure to warrant the expense. If for example an investment in a computer software that will save significant time and enable a solid reporting process to mitigate risk and liability then it may be considered however, there must be a formal examination of all aspects prior to approval.
- We set our financial goals based sound business practices and we measure our direction and outcomes regularly while always working to maximize opportunities for funding support and controlling costs for rate payers.
- We have established and presented Council with:
  - a Five Year Capital Financial Plan spanning 2013-2018

- an Annual Capital Financial Plan 2013-2014
- Annual Operating Budget

### **Infrastructure Planning and Management Roads, Waterworks, Buildings, Arenas, Fields and Equipment**

The management of the Town's infrastructure, roads and waterworks, buildings, fields, play areas and equipment requires constant vigilance as these are the areas of higher potential risks. Work is constant to maintain safe travel within the Town, snow and ice clearing, weather monitoring, street lights, traffic signs, directional signage, drinking water quality management, distribution and infrastructure maintenance and management as well as maintaining safe services on our public sports fields and indoor public facilities and spaces. Because of the unpredictable nature of some of the conditions and work in these areas, there is a need to assess approvals for various proposed activities within the Corporate Capital Plan and to more efficiently link actual work to the financial plan for optimum tracking.

- An Energy Conservation and Demand Management Plan 2013 – 2014
- A Corporate Asset Management Plan for 2013
- 2014 Settlement and Servicing Master Plan
- Joint Use Agreement for Centre 2000 (currently in an update phase to rectify shortcomings and foster stronger partnerships)
- Minimum Standards for Maintenance of Municipal Highways Report
- State of the Infrastructure Roads Report
- 2013 OSIM Structure Inspections Report

### **Public Safety, Fire and Emergency Services**

Public Safety is of the utmost importance and the Town takes all responsibilities in this area very seriously. Aside from the areas already covered, this Key Priority will address Building and Bylaw Strategic Activities including plan approvals, enforcement of infractions and cease and desist orders in cases of unsafe or unapproved activities. Strategies to manage new legislation, public education and risk mitigation for the Town [and costs to the taxpayers] is critical.

This section also will address specific requirements, priorities and strategic activities related to the provision of Fire Safety and Emergency Services. This department must uphold legislation from the Ontario Fire Marshal's office, the Fire Code, Fire Prevention and Safety Act, the Vulnerable Populations in Residential Occupancies Standards among others. Specific strategies to support tracking and delivery of increased standards for mandatory and ongoing staff training for fire department staff will also be addressed as will equipment standards, maintenance as well as ongoing upgrades to regulatory compliance.

Strategies for public education in times of emergencies and community wide emergencies will also be addressed.

### **Environmental Stewardship, Advocacy and Protection**

Protecting, maintaining and enhancing the natural environments within the Town of Erin is of the utmost importance. We will be leaders in environmental stewardship for the good of the Town and future generations. Our policies and actions will reflect our commitment to:

- Our unique and environmentally sensitive location at the Headwaters of the Credit River
- Partnerships with Credit Valley Conservation Authority, the Grand River Conservation Authority, Ontario Ministry of the Environment and local environmental interest groups
- Unique land and water habitats and species
- Agricultural lands
- Our sources for sustainable quality drinking water
- Balanced eco-tourism initiatives including the Trans Canada Trail and the Elora Cataract Trailway
- Enhancing our environmental knowledge base to ensure quality future decisions regarding use of our lands, housing developments and other activities that impact our environment.
- Engaging our local community in the environmental stewardship process

### Preliminary Strategic Priority Details Pillar #3 - Community Capacity Building

#### **An Engaged and Involved Community**

A Community that is aware of Town activities and priorities and participating on a local level within all hamlets and villages and at the County Level

- Communication standards are established to ensure communities are aware of access points to information about the town and these are provided in multiple ways to maximize opportunities to maintain awareness
- Community engagement processes are part major decision making and quality assurance measurement processes – no surprises, opportunities for a voice, timely responses and a sense that we are all in this together.
- Services are considerate of both assessed and expressed needs
- Communication standards are maintained and are accessible

#### **A Planned, Accessible and Sustainable Community**

In compliance with the Municipal Planning Act of Ontario and all related legislation, Regulations and Bylaws, the Town is planned in a way to sustain the community within the parameters of reasonable growth and responsible use of local resources

- Capacities related to land use, environmental impact and transportation are measured and monitored on a regular and ongoing basis
- A mix of land use types, business economic, industrial, residential, institutional and natural lands are considered and managed within the planning process to ensure that harmony and balance is achieved and maintained and a tax base exists to support the administration of the Town

- We value families and cohesive neighbourhoods. Residential housing plans consider all stages of life and promote supports for an aging population in partnership with government and social service health care supports.
- Communities are planned to support “local lifestyles” and promote local shopping, recreation, sport and cultural activities that serve to support and nurture an active and healthy lifestyle.
- Review and update the Town’s Official Plan
- Work with the Economic Development Officer to establish supports to further populate employment lands
- Develop a business education package for potential new businesses to ensure a welcoming and clear understanding of any applications to the planning department regarding zoning and delegation processes for Council to foster new development and tax revenue opportunities for the Town.

### **Building, Branding and Maintaining Strong Local Economies**

The viability of the Town of Erin is dependent upon a strong local economy. We consider that:

- Services and businesses are located throughout the Town of Erin and all require supports and services to sustain local economies
- Strong local economies sustain strong property values and in turn enable our neighbourhoods to prosper and thrive with a variety of local services and amenities.
- We are committed to working in partnership with local business groups e.g. LGHG, Erin BIA, East Wellington Chamber of Commerce to ensure supports are available to enable ongoing business success and a diversity of services.
- We are committed to supporting industries that are mutually beneficial to our local economy and reflect our heritage and values including agriculture, ranching and the equine industry.

- We will support economic development activities to sustain our local economy and thereby our investments and infrastructure.
- The Town of Erin has recently approved the hiring of an Economic Development Consultant. This individual will work with local businesses, tourism officials and Town staff to develop supports and key strategic activities as part of the Town's Strategic Plan to enhance Economic Development and Tourism. This individual will support the Town's Economic Development Committee

### **Proud Place of Heritage, Culture and the Arts**

Guided by our roots, our communities have been and continue to be rural and urban agriculturally-based settlements that attract day and short stay visits from tourists. Key Strategies are required to maintain these efforts, maximize partnerships and community capacity to support these activities from a volunteer base.

- We host one of the largest and most successful Fall Fairs in the Province and our community is alive with many vibrant "signature" events year round.
- Our communities host several theatre, dance and performing arts groups
- The Town of Erin serves as a popular "day or two" tourism destination and these activities support the local economy
- Our local BIA's and Arts Groups host special annual events such as "The Hills of Erin Studio Tour", Christmas Window Wonderland and Christmas Tree Lighting Evening, Rib Fest and Sidewalk Sales
- Local schools, Community Service Groups and Churches work together to host Breakfasts with Santa, Breakfast with the Easter Bunny and the Annual Santa Claus Parade among other activities for the community
- Numerous community sports leagues, dance schools and other special interest activities and lessons are available and operated through grass roots organizations