



Loyalist Township Strategic Plan

Ontario East Municipal Conference
– September 12, 2013



Outline

- Loyalist Township 101
- Impetus for the Strategic Plan
- MMAH Involvement
- Process After MMAH
- Preparing Report , Key Themes & Content
- Post Adoption
- Benefits



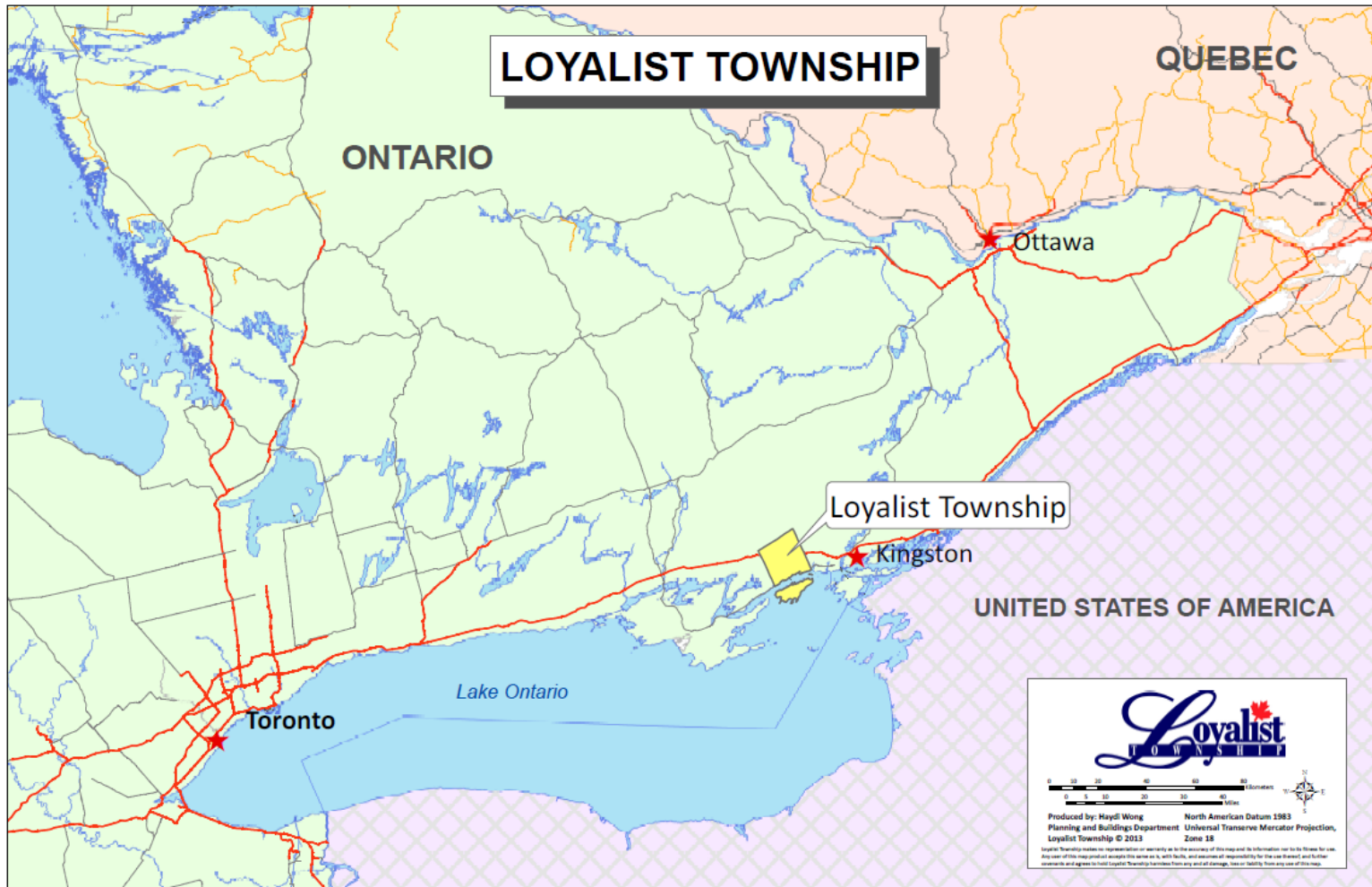
Loyalist 101

- Located just west of Kingston, along the north shore of Lake Ontario
- 2011 population – 16,200 – 7.7% growth rate between 2006-2011
- Comprised of three larger communities, five hamlets and 80% of land base is rural
- Pressure on budget, declining industrial tax base, increasing reliance on residential assessment



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Impetus for the Strategic Plan

- Township has many plans – Official Plan, Recreation Master Plan, 10 year capital budget – nothing tied these together
- Staff prepared a performance management report – suggested strategic plan as a means to measure performance in Loyalist context



Impetus for the Strategic Plan

- New Council, Mayor very supportive
- Many on Council saw a strategic plan as providing accessible and transparent government
- Council wanted a tool to effectively manage scarce resources



MMAH Involvement

- Township had little budget to prepare a plan, MMAH provided free facilitation services – good reputation
- Provided neutrality for staff & Council
- Helped to facilitate & focus – not control
- Brainstorming – participants ranked ideas based on short, mid and long term horizons
- MMAH tallied results – common themes were evident



Process After MMAH

- Many related ideas were combined into common themes
- Amount of goals and objectives was still too ambitious
- Council and senior staff met again to refine the tasks and confirm priorities
- Open discussion, respect for each other, lead to consensus



Preparing Strategic Plan Report

- Many examples of reports already existed on-line – structure, mission and vision statements, performance indicators
- Review of academic articles about how to make plans relevant after adoption such as linkage to yearly budget
- Prepared implementation and monitoring mechanisms



Key Themes

- Promote and Manage Economic Development
- Manage Growth with Environmentally Sound Policies
- Strengthen the Township's Financial Position
- Address the Township's Municipal Infrastructure Needs



Key Themes

- Provide a Well-Managed and Effective Municipal Government
- Enhance Communication between the Township and its Stakeholders
- Promote Healthy Lifestyles, Culture, Heritage and Sports
- Under each goal were 3 to 6 strategic actions
- 2012-2015 time horizon



Content: Example of Goal Detail

Provide a Well-Managed and Effective **Direct and Manage Economic Development.**

Strategic Actions

a) Develop an Economic Development Growth Strategy.

By developing an Economic Development Growth Strategy for the Township in consultation with community leaders, the County and Provincial ministries.

- **Responsibility: C.A.O. and Council**
- **Resources: County Manager of Economic Development, Director of Planning and Development Services, Director of Engineering Services, other Township staff, Loyalist Economic Development Task Force and future budget considerations**
- **Timeframe: Loyalist Economic Development Task Force recommendations (Fall 2012) and implementing said recommendations (June 2013)**
- **Performance Indicators: The creation of an Economic Development Growth Strategy**
- **Project Status: Loyalist Economic Development Task Force (has been initiated) Recommendations (to be initiated)**



Content: Overall Timeline Chart

Corporate Work Plan 2012-2015

Goals and Strategic Actions	2012	2013	2014	2015
1. Direct and Manage Economic Development.				
1.1 Develop an Economic Development Growth Strategy.				
1.2 Strengthen ties with economic development partners.				
1.3 Plan sufficient designated serviceable land for prospective businesses.				
2. Manage Growth and Protect the Environment.				
2.1 Update and maintain the Official Plan with the following goals:				
(i) To identify a direction regarding the future growth of the Township .				
(ii) To expand existing sustainability policies and review growth policies and settlement area boundaries.				
(iii) Plan sufficient designated land for prospective residents.				
2.2 Develop rural and urban design guidelines and policies to promote healthy, walkable and accessible communities.				
2.3 Foster partnerships with diverse stakeholders to prepare an Ecologically Sensitive and Shoreline Lands Assembly Plan.				
2.4 Develop strategies and implement policies based on existing ground water and drinking water source protection studies.				
2.5 Determine requirements for augmenting water and sewer plant capacity where possible in order to allow for continued long-term growth.				
3. Strengthen the Township's Financial Position.				
3.1 Develop a long-term Financial Plan.				
3.2 Conduct cost benefit analyses of significant new initiatives.				
3.3 Continue to work with the federal and provincial governments to secure greater funding for the Township.				
4. Address the Township's Municipal Infrastructure Needs.				
4.1 Address the space issues within the Odessa Municipal Building to enhance the operations and productivity of Staff.				
Phase 1: By developing a plan to accommodate the current number of Staff + 20% for growth.				
Phase 2: By implementing the plan to address the space issues.				
4.2 Construct a new training room at the Amherst Island Fire Station.				
4.3 Develop a policy for establishing service levels for different road surface types.				
5. Provide a Well-Managed and Effective Municipal Government.				
5.1 Develop service standards for each municipal department to improve operational efficiencies.				
5.2 Review the Township's organizational structure.				
5.3 Develop a Succession Plan Policy.				
5.4 Plan and enhance technology-based options to improve service delivery, including e-billing and online payment options as well as electronic document storage.				
5.5 Continue to review options for Alternative Service Delivery.				
5.6 Create and put into practice an Energy Conservation and Demand Management Plan.				
6. Enhance Communication between the Township and its Stakeholders.				
6.1 Develop a communication strategy.				
7. Promote Healthy Lifestyles, Culture, Heritage and Sports.				
7.1 Complete the Recreation Master Plan review.				
7.2 Encourage the preservation and maintenance of heritage buildings and sites.				
7.3 Actively promote healthy community features when reviewing development proposals.				

■ Timeframe (i.e., from start date to deadline)
■ Target Date (i.e., just the deadline)
■ Ongoing (i.e., no beginning or end)

Loyalist Township Strategic Plan 2012-2015

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Loyalist Township Strategic Plan (2012-2015)



- Legend**
- Mayor &/Council
 - C.A.O.
 - Administrative Services
 - Finance
 - Planning
 - Engineering
 - Recreation
 - Fire

Vision
 "Loyalist Township is dedicated to promoting the quality of life and prosperity of community for present and future generations." – Council

Mission
 "The Township Vision will be achieved through Council leadership and the provision of professional, cost-effective, community-focused and sustainable services and economic growth." – Council

Goals & Actions

Promote and Manage Economic Development

- Develop an Economic Development Growth Strategy.
 - C.A.O. & Council (Fall 2012 & June 2013).
- Strengthen ties with economic development partners.
 - Mayor, C.A.O. & Planning (December 2012).
- Plan sufficient designated serviceable land for prospective businesses.
 - Planning (January 2014 & January 2016).

Manage Growth with Environmentally Sound Policies

- Update and maintain the Official Plan with the following goals:
 - a) to identify a direction regarding future growth of the Township
 - b) to expand existing sustainability policies and review growth policies and settlement area boundaries
 - c) plan sufficient designated land for prospective residents
 - Planning (2013 - 2014).
- Develop rural and urban design guidelines and policies to promote healthy, walkable and accessible communities.
 - Planning (2015).
- Foster partnerships with diverse stakeholders to prepare an Ecologically Sensitive and Shoreline Lands Assembly Plan.
 - Planning, Recreation & CRA (2015).
- Develop strategies and implement policies based on existing ground water and drinking water source protection studies.
 - Planning, Engineering, Recreation & Project Coordinator & Compliance Supervisor (2013 - 2015).
- Determine requirements for augmenting water and sewer plant capacity where possible in order to allow for continued long-term growth.
 - Engineering (December 2014).

Strengthen the Township's Financial Position

- Develop a long-term Financial Plan.
 - Finance (December 2012).
- Conduct cost benefit analyses of significant new initiatives.
 - Finance (December 2012).
- Continue to work with the federal and provincial governments to secure greater funding for the Township.
 - Council, C.A.O., Finance & Engineering (Ongoing).

Address the Township's Municipal Infrastructure Needs

- Address the space issues within the Odessa Municipal Building to enhance the operations and productivity of Staff.
 - Administrative Services (April 2013).
 - Project Management Staff (April 2014).
- Construct a new training room at the Amherst Island Fire Station.
 - Fire (Mid-2014 to Mid-2015).
- Develop a policy for establishing service levels for different road surface types.
 - Engineering (2014).

Provide a Well-Managed Municipal Government

- Develop service standards for each municipal department to continually improve operational efficiencies.
 - All Departments (December 2014).
- Review the Township's organizational structure.
 - C.A.O. (December 2012).
- Develop a Succession Plan Policy.
 - C.A.O. & Other Dept.'s (December 2012 – Spring 2013).
- Plan and enhance technology-based options to improve service delivery, including e-billing and online payment options as well as electronic document storage.
 - Administrative Services, Computer Committee & IT Manager (ongoing).
- Continue to review options for Alternative Service Delivery.
 - Finance & Other Dept.'s (annual).
- Create and put into practice an Energy Conservation and Demand Management Plan.
 - Engineering, Recreation & Finance (July 2014).

Enhance Communication between the Township and its Stakeholders

- Develop a communication strategy.
 - C.A.O. (January 2013 - June 2013).

Promote Healthy Lifestyles, Culture, Heritage & Sports

- Complete the Recreation Master Plan review.
 - Recreation (Mid-2013 to December 2014).
- Encourage the preservation and maintenance of heritage buildings and sites.
 - Planning & Recreation (ongoing).
- Actively promote healthy community features when reviewing development proposals.
 - Planning, Engineering & Recreation (ongoing).

Public Involvement

- Loyalist chose limited public engagement because Council members were recently elected to represent and make choices
- Concern that too much input would delay process
- Public was asked to comment on the draft final plan
- Used questionnaires and on-line survey



Post Adoption

- CAO has prepared one status report to date, annual monitoring and reporting to occur
- All staff reports have to show linkage to strategic plan – also to be embedded in 10 year capital budget
- Next series of objectives are being worked on – economic development strategy, organizational review are examples



Benefits

- Township vision is created which crosses departments
- Constant linkage between reports and plan
- Made in Loyalist report without the use of consultants - prepared by Township staff
- Inexpensive and timely
- Flexible approach, easily updated
- Opportunity for new Council to set direction
- Accessible, transparent document



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Link to Strategic Plan:

<http://www.loyalistship.ca/strategicplan>



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