Strategic Plan
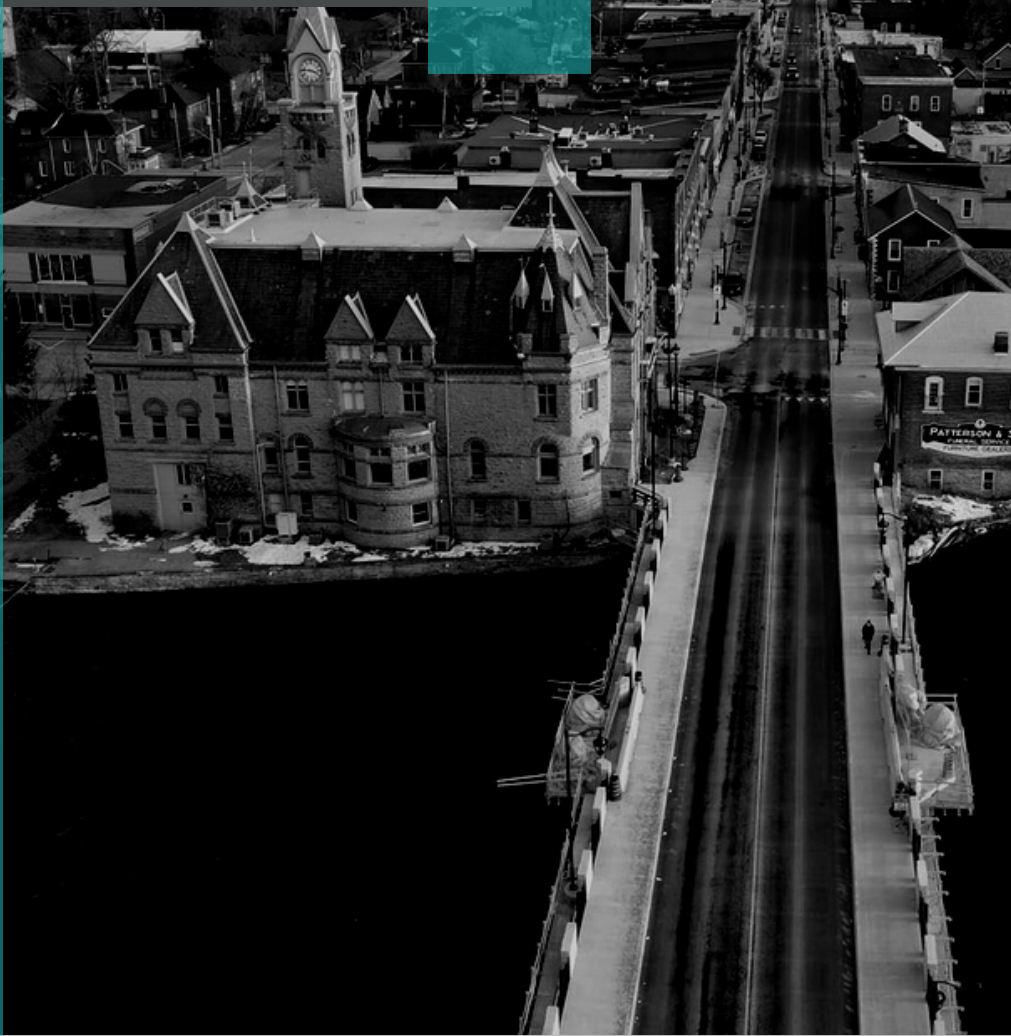
2023 - 2026

Prepared By:

Lockhart Facilitation and Queen's Executive Decision Centre

Contents:

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Defining Success

Carleton Place is viewed as a top destination with great quality of life and progressive leadership. We have earned this reputation by:

1. Delivering significant programming that provides something for all cultural and age groups
2. Offering residents best in class events and a vibrant downtown
3. Leading transportation options including active, connected trails and new services
4. Engaging and communicating with our community
5. Managing commercial growth focused on the types of businesses and employers that bring value
6. Maintaining our corporate health & sustainability

… So that we preserve our identity and are ready for our next phase of growth

Vision
We provide good governance through progressive leadership to residents and businesses.

Mission
Proudly working for and with the people of Carleton Place

Priorities
2023-2026 •••••

1. **Service Delivery and Communications** – Goal: enhance service and improve efficiencies.

2. **Facilities and Infrastructure** - Goal: ensure long-term viability of our assets and Town financial sustainability.

3. **Tourism and Events** - Goal: to meet the demographics and cultural diversity of our growing community, attract visitors and establish an identity.

4. **Economic Development and Managed Commercial Growth** - Goal: create diversified tax base and job growth.

5. **Transit System & Options**: implement transportation master plan - Goal: better move people and goods in Town and beyond in a sustainable way.
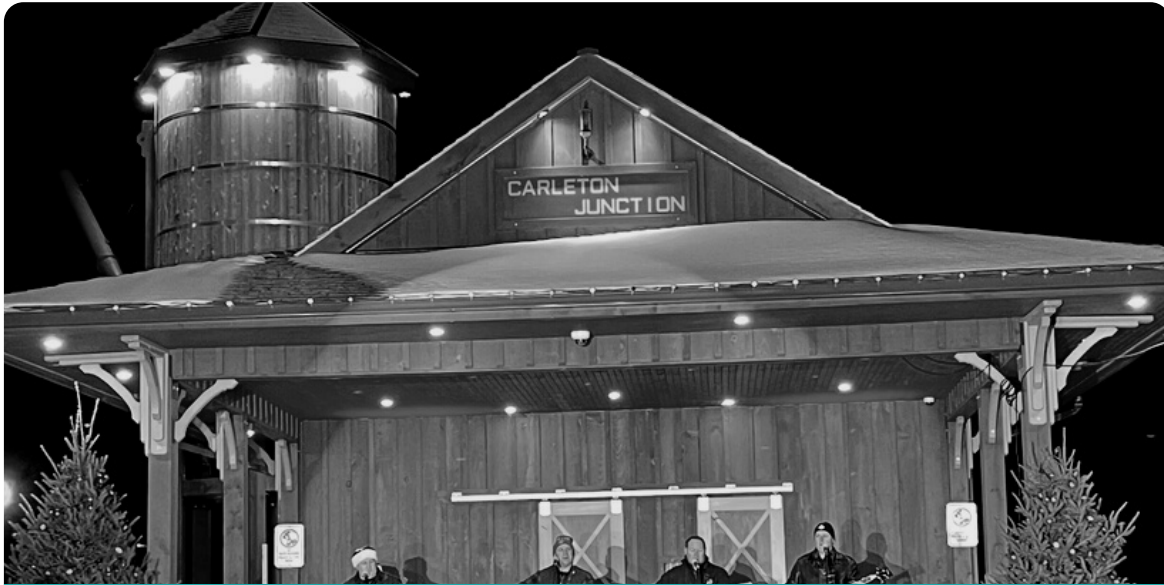
Objectives (By Priority)

Priority	Objectives by end of 2026 (most urgent in bold)
Service Delivery & Communications	1. **100% of services feasible to be made available online including a standardized booking system** 2. **Improve functionality of the Town's website** 3. Development of data and analytics to assess communications efforts
Facilities and Infrastructure	1. **Improve Asset Management to engage Council and community** on levels of service and effects on assets/budget to ensure long-term viability and sustainability of the Town's assets 2. **Develop a Multi-Use Recreation Facility Concept Plan**
Tourism and Events	1. **Engage with community partners to determine existing and future community needs/wants.** Employ survey options to determine what the community wants 2. **Create events** tailored to meet community demographics 3. Expand community assets to increase sports and cultural tourism
Economic Development & Managed Commercial Growth	1. **Map existing industries** to identify community gaps. 2. Develop existing and identify additional employment lands by end of Council term 3. Create central business information hub e.g., website business portal
Transit System and Options	1. **Undertake a transit study** to identify options for intra (in Town) and inter (between communities) connectivity 2. Determine any areas of transit inter-municipal cooperation/efficiency 3. Develop transit pilot service (local and commuter) by end of term 4. Identify improvement areas for non-vehicular traffic

Priority Initiatives (2023-2024 in bold)

Priority	Initiatives (2023-2024 in bold)
Service Delivery & Communications	1. **Integration & Expansion of online registrations/payments** through a single platform 2. **Prioritize what areas are most requested by residents** 3. **Develop a forms policy** for non-legislated matters where feasible 4. Implement the **currently planned and in-process efficiency software** for Building E-Permitting and online Inspection Requests, Childcare, Facility Booking System 5. **Website refresh**
Facilities and Infrastructure	1. Determine a location/functions for a new recreation facility and how it will be funded 2. Focus on resident requests that are not currently possible to be offered ANYWHERE in town. Repurpose existing facilities where feasible 3. **Statutory requirements of Emergency Plan should be a consideration in facility viability** 4. **Continue progress on Asset Management Plan** to final consultation stage
Tourism and Events	1. Engage a survey specialist 2. Do an **inventory of existing assets.** 3. Amend development charges study/by-law to pay for growth-related assets. Investigate grants or other funding options for non growth-related projects 4. Establish a community **Signature Event** 5. **Promote partnerships with community groups** for events/facility use.
Economic Development & Managed Commercial Growth	1. Develop a Business Registry / Licensing Portal 2. Determine options for additional employment lands 3. Utilize GIS to visualize our current/new businesses 4. Support current businesses that wish to expand/grow their business 5. Consider the need for an EDO before the end of the Council term
Transit System and Options	1. **Implement active transportation strategies** outlined in the Transportation Master Plan 2. Issue a Request for Proposal to retain a Transportation Consultant to conduct a transit study 3. Financially plan for RFP outcomes.

Implementation in 2023-2024 (where do we get started?)

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1. 100% of services feasible to be made available on-line including a standardized booking system.
2. Improve functionality of the Town's website.
3. Improve Asset Management to engage Council and community on levels of service and effects on assets/budget to ensure long-term sustainability of the Town's assets.
4. Develop a Multi-Use Recreation Facility Concept Plan.
5. Engage with community partners to determine existing and future community needs/wants. Employ survey options to determine what the community wants
6. Create events tailored to meet community demographics.
7. Map existing industries to identify community gaps.
8. Undertake a transit study to identify options for intra (in Town) and inter (between communities) connectivity.

Resources Required

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There will be investments required above current budgets in the following areas:

- 100% of services feasible to be made available on-line including a standardized booking system.
- Improve Asset Management to engage Council and community on levels of service and effects on assets/budget to ensure long-term viability and sustainability of the Town's assets (we have funding in year 1, however additional funding will be required in 2024-2025 to meet legislative deadlines).
- Develop a Multi-Use Recreation Facility Concept Plan.
- Create events tailored to meet community demographics.
- Expand community assets to increase sport and cultural tourism.
- Undertake a transit study to identify options for intra (in Town) and inter (between communities) connectivity.

Investments required will be determined as part of future budget processes. It is expected that all other initiatives can be achieved with existing staff resources.

Monitoring Plan

Performance Metrics

- # of new businesses / industries
- Increase in commercial/industrial assessment relative to residential
- # of services offered on-line and uptake / usage
- # of community events
- Uptake of CP Scoop (increase #s & use)
- Completed transit study
- AMP approved by July 2025

Activity	Purpose	Reporting Mechanism	Key deliverables
Annual Report to Council	Inform Council and Public of progress	Council report Website post	Informed Council
Strategy Update with Council (bi-annual)	Review initiatives and action plans	Website post	Updated initiatives and Action Plans for each priority
Strategy Renewal (March 2027)	Full refresh of environmental scan, vision, mission, and priorities	New strategic plan	New strategic plan (2027-2030)

Annual Reporting to Council

Below is the suggested template for the Annual Report to Council on progress.

Priority: Service Delivery and Communications		
Objectives by end of 2026	Champion	Status (Tasks completed and/or outstanding)
1. 100% of services feasible to be made available online		
2. Improve functionality of Town's website		
3. Development of data and analytics to assess communications efforts		

Progress Legend	
Progress	**Legend**
Completed, take off map	
Work in progress	
Stop doing	

Next Steps in Bringing Plan to Completion

1. Present draft to Committee of Whole - May 23, 2023
2. Council to adopt the plan - June 6, 2023
3. Communications plan - Communications Coordinator

Strategy At a Glance

Mission
Proudly working for and with the people of Carleton Place

Vision
We provide good governance through progressive leadership to residents and businesses.
Our goals related to this are to:

- Deliver significant programming that provides something for all cultural and age groups
- Offer residents best in class events and a vibrant downtown
- Leading transportation options including active, connected trails and new services
- Engage and communicate with our community
- Manage commercial growth focused on the types of businesses and employers that bring value
- Maintain our corporate health & sustainability

So that we preserve our identity and are ready for our next phase of growth

Five Priorities in 2023–2026 (with objectives)

Service Delivery
Within 1–2 Years (Urgent)
- 100% of services feasible to be made available on-line including standardized booking system
- Improve functionality of Town's website

Future items
- Development of data and analytics to assess communications efforts

Facilities & Infrastructure
Within 1–2 Years (Urgent)
- Improve Asset Management to engage Council and community on levels of service and effects on assets/budget
- Develop a Multi-Use Recreation Facility Concept Plan

Tourism & Events
Within 1–2 Years (Urgent)
- Engage with community partners to determine existing and future community needs/wants
- Create events tailored to meet community demographics

Future items
- Expand community assets to increase sport and cultural tourism

Economic Development
Within 1–2 Years (Urgent)
- Map existing industries to identify community gaps.
- Develop existing and identify additional employment lands by end of Council term

Future items
- Create central business information hub
- Consider the need for an EDO before the end of the Council term

Transit System
Within 1–2 Years (Urgent)
- Undertake a transit study to identify options for intra (in Town) and inter-connectivity

Future items
- Determine any areas of transit inter-municipal cooperation/efficiency
- Develop transit pilot service (local and commuter) by end of term
- Identify improvement areas for non-vehicular traffic

Carleton PLACE
Strategy "At a Glance" (2023-26)

Scorecard (KPIs)
- # of new businesses / industries
- Increase in commercial/industrial assessment relative to residential
- # of services offered on-line and uptake / usage
- # of community events
- Uptake of CP Scoop (increase #s & use)
- Completed transit study
- AMP approved by July 2025

Progress Legend

Progress	Legend
Completed, take off map	
Work in progress	
Stop doing	

Monitoring Plan
- ✓ Annual Report to Council
- ✓ Strategy update in October 2024
- ✓ Strategy renewal in March 2027

Last Updated: May 1, 2023

Appendix A
Environmental Scan

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Opportunities
1. Refocus energy to provide diverse & accessible amenities
2. How to attract commercial & industrial businesses and have land available to do so
3. More events for all ages & tourism
4. Green thrust on all facilities
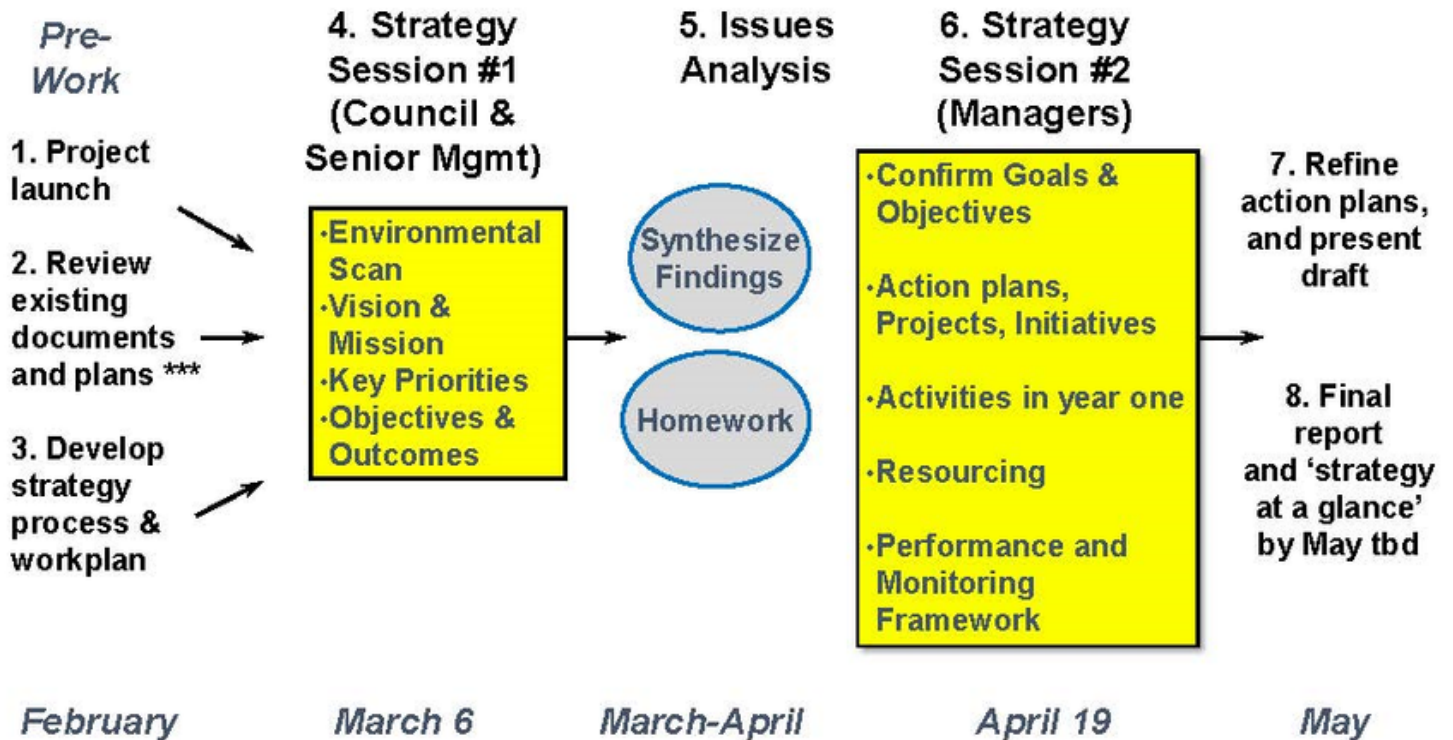5. Find funding for special projects

Threats and Risks
1. How to maintain service levels during periods of high growth
2. Loss of Development Charges
3. Changing demographics: young families, aging population
4. Development challenges and lack of space for growth
5. Asset condition and sustainment

Trends and Developments in Our Environment
1. Diversity, accessibility and cultural changes in our community
2. Repurposing current facilities to meet emerging needs
3. Lack volunteers in new generation… reengagement
4. Increased Working From Home (WFH); internet infrastructure
5. Demographics: young families and aging population
6. Active and shared transportation

Appendix B: Strategy Project Overview

Pre-Work	4. Strategy Session #1 (Council & Senior Mgmt)	5. Issues Analysis	6. Strategy Session #2 (Managers)	
1. Project launch	·Environmental Scan ·Vision & Mission ·Key Priorities ·Objectives & Outcomes	Synthesize Findings	·Confirm Goals & Objectives	7. Refine action plans, and present draft
2. Review existing documents and plans ***		Homework	·Action plans, Projects, Initiatives	
3. Develop strategy process & workplan			·Activities in year one	8. Final report and 'strategy at a glance' by May tbd
			·Resourcing	
			·Performance and Monitoring Framework	
February	March 6	March-April	April 19	May

* 2018 Plan
* OP Review
* Long Term Financial Plan
* Master Plans and other Plans (AMP, CIP, DC, IT)

Carleton PLACE