



**Balancing Growth
2019 – 2023
Corporate Strategic Plan**



BACKGROUND

Carleton Place is experiencing its most rapid period of growth ever. With a new and engaged council, a complement of excellent staff and with firm priorities set in each department, the Town is well-positioned to balance this tremendous growth with its incredible small-town feel.

Changes in council and senior staff, in ratepayer expectations, in provincial requirements and in local demographics have given rise to a need to redefine the Town's vision and values, goals and objectives. To accomplish this, it engaged in a structured process of Corporate Strategic Planning and Action Planning. And as a result, Carleton Place has come up with a formula for success.

Consultants at BIG THINKING were contracted to lead the Corporate Strategic Planning process which included:

- A start-up meeting with the Mayor and Chief Administrative Officer
- A survey of and interviews with every Councillor and senior member of staff
- An evening session focused on the Council's mission, vision and values
- A full-day session focused on goals and objectives with the Mayor and Council, CAO and senior staff
- A morning Action-planning session with the mayor and council, CAO and senior staff
- A survey of Town committees to identify internal partners in action
- A survey of and interviews with key stakeholders to identify external partners in action
- A presentation of the draft report to the Committee of the Whole of Carleton Place Council
- An evening session with the Mayor, Councillors and CAO to make final decisions

The report is a living document, meant to be modified annually with new information. Shifts in the timeline may occur as new funding opportunities, partnerships, direction from other levels of government and priorities emerge. Annual progress reports and adjustments to the Corporate Strategic Plan are intended to be part of the process.

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BIG THINKING

INTRODUCTION

The Council of the Corporation of the Town of Carleton Place collaborated with staff to identify goals and objectives and decide on a Corporate Strategic Plan for this term of council, 2019 to 2022. They made a commitment to strike a balance between responding to the significant residential and business growth which is occurring and enhancing the quality of life of the people who live here with improved services and amenities.

Internal and external stakeholders who worked on the Corporate Strategic Plan agreed this is an exciting time for the small town. Participants in the process included:

- Mayor Doug Black
- Deputy Mayor Sean Redmond
- Councillor Jeff Atkinson
- Councillor Theresa Fritz
- Councillor Toby Randell
- Councillor Linda Seccaspina
- Councillor Andrew Tennant
- Chief Administrative Officer Diane Smithson
- Senior members of Town staff: Clerk Stacy Blair, Treasurer Trisa McConkey, Joanna Bowes, (Planning,) Meriah Caswell, (Library,) Robin Daigle, (Engineering,) Tracey Freill, (Childcare Services,) Joanne Henderson, (Recreation and Facilities,) Pascal Meunier, (Fire, By-law and Protective Services,) Lennox Smith, (Building and Inspection,) and Dave Young, (Public Works)
- Internal partners from Town committees: Parks and Recreation, Heritage, Municipal Drug Strategy, Urban Forest, River Corridor and Accessibility, Environmental Advisory, Police Service Board
- External partners: Mary Wilson-Trider, (Carleton Place and District Memorial Hospital,) Jackie Cavanagh, (Carleton Place Chamber of Commerce,) Kate Murray, (Downtown Business Association,) Danielle Shewfelt, (Leeds-Grenville Lanark Health Unit,) and Derek Needham, (Ontario Provincial Police)

While opportunities bring challenges, the tension that arises from this seeming conflict actually results in positive transformations. Council and staff are dedicated to managing this tension proactively. They have developed a new mission statement and vision statement and have made a commitment to be guided by their stated values throughout the term. Great things are happening in Carleton Place.



Mission

Proudly working for and with the people of Carleton Place.

Vision

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

Values

A community-focused Carleton Place Council values accountability, integrity, transparency and collaboration for the fulfillment of all.

Strategic goals and objectives, the Action Plan and quick wins

Council and senior staff established strategic goals and objectives through a process of consensus following an analysis of opportunities and threats and the Town's weaknesses and strengths.

A timeline for action was set by senior staff at an Action-planning session. They considered their departments' current workloads and other influencing factors. Staff used the SMART model to determine if objectives and the Action Plan were: specific, measurable, achievable, relevant and time-bound.

The Town's current [long-term financial plan for 2018 to 2027](#) includes many capital projects and will be updated as projects and capital works identified here are further refined.

In developing the Action Plan, staff also determined that there were quick wins for each objective, projects which can begin immediately within existing work-plans and ideas that could shift thinking.



Goal	Comprehensive Communication
Objectives	Develop and implement a robust internal and external Communications Plan
Why	Council wants to communicate its decisions, corporate information and community news in a positive way. They want to promote, protect and enhance the small-town identity that defines the community and to tell the story of Carleton Place in a timely manner.

What

Conduct an audit of current internal and external communications practices using available tools and resources. A comprehensive communications plan will consider corporate, council and public needs and address internal and external communications. It will improve web presence and include a plan for managing social media. The communications plan will be implemented by staff but undertaking training and contracting outside experts may be necessary to complete it.

Timeline

Year	Project	Action
2019 Q3	Communications Plan	Start communications audit
2019 Q3	Communications Plan	Establish working group to review findings
2019 Q4	Communications Plan	Write the communications plan
2020 Q1	Communications Plan	Complete, approve and adopt
2020- 2023	Communications Plan	Implement

Quick wins

- Focus on social media
- Release council meeting information in real time
- Develop engaging content
- Promote the work of committees by sharing content
- Enhance the promotion of Carleton Place by sharing local stories and researching facts
- Monitor web site information to keep content current
- Departments update their own web content
- Take advantage of training opportunities to increase skills and expand ideas
- Councillors participate in communications learning sessions at conferences when possible

Resources needed

Budget, outside resources to build internal capacity and knowledge, all departments and council commit to the communications plan.

Goal	Managed Growth
Objectives	Revise the Official Plan and Development Permit By-law
Why	The Official Plan guides the community so must accurately reflect its needs. Annual growth has surpassed expectations. The growth has caused issues which can be solved by clarifying the Development Permit By-law.
	Review issue of mixed and affordable housing
Why	Many residents of Carleton Place are unable to find affordable rental units or purchase properties. The term, affordable housing, is confusing as is the related hierarchy of government responsibility.
	Conduct a new Development Charges background study and revise the by-law by term-end
Why	A Development Charges background study is needed to accurately reflect new capital projects which are attributable to recent growth including the development of strategic properties.

What

The Planning Department with the help of a consultant will engage community and interested partners to revise the Official Plan, the Development Permit By-law and the Development Charges background study and to define affordable housing in Carleton Place. It will explore options for affordable housing through a community forum with appropriate partners like Lanark County, the Province of Ontario and Canada Mortgage and Housing Corporation and will conduct an affordable housing policy review. The Provincial Policy Statement defines Affordable Housing as:

- a) In the case of ownership housing, the least expensive of:
 - housing for which the purchase price results in annual accommodation costs which do not exceed 30 per cent of gross annual household income for low and moderate income households or
 - housing for which the purchase price is at least 10 per cent below the average purchase price of a resale unit in the regional market area.

b) In the case of rental housing, the least expensive of:

a unit for which the rent does not exceed 30 per cent of gross annual household income for low- and moderate-income households or

a unit for which the rent is at or below the average market rent of a unit in the regional market area.

Timeline

2019 Q2	Interim Control By-law 51-2019	Passed by council
2019 - 2023	Official Plan amendments as required	Approved if necessary
2019 Q4	Development Permit housekeeping review	By-law review to include legislated and non-legislated updates
2020 Q1	Affordable Housing forum	Host the forum with partners
2019 Q2	Intensified Housing study (as per Interim Control By-law)	Start the study
2020 Q2	Development Charges background study	Start the study
2020 Q3	Development Charges background study	Finish, approve and implement
2020 Q2	Intensified Housing study (as per Interim Control By-law)	Complete, approve and adopt
2021 Q3	Comprehensive Official Plan review	Start the review
2021 Q4	Affordable Housing policies	Review in conjunction with Official Plan
2022 Q2	Development Permit By-law review	Start the review
2022 Q3	Comprehensive Official Plan review	Complete, approve and adopt
2022 Q4	Development Permit By-law review	Complete, approve and adopt

Quick Wins

- The Interim By-law 51-2019 is a by-law to control the erection or development of stacked townhouses, apartments, triplex units and quadraplex units within defined areas of the Town of Carleton Place for a period of one year which will allow time for the subsequent study to be undertaken to review Development Permit regulations and associated land use policies pertaining to multi-storey, multi-residential developments in established residential neighbourhoods.
- Development Permit by-law housekeeping revision will alleviate pressure
- Review Parking by-law and allocate resources for additional enforcement

- As projects attributed to growth come up, Development Charges should be collected and by-law amended if necessary
- Consultant fees for studies can come out of Development Charges
- An Affordable Housing forum led by a consultant or by Lanark County will contribute to the education of all and may consider tiny homes, secondary suites, seniors housing, social housing, et cetera.
- Specific Official Plan amendments and possibly a mini-study may be undertaken to address immediate concerns about density per net hectare, design, massing and consolidation of lots in advance of the full Official Plan review. The Development Permit By-law could then be amended as required.

Resources Needed

Budget, consultants for Intensified Housing study, Official Plan and Development Permit reviews, Development Charges background study and Affordable Housing Forum, staff to rewrite and enforce Parking by-laws including administration for the payment of tickets and attending POA Court, new technology for parking enforcement, interest in affordable housing from Lanark County and the Province of Ontario.

Goal	Corporate Health
Objective	Conduct organizational review of staff
Why	To accommodate community growth, to ensure succession plan to prevent disruption of services and to increase productivity
Objective	Enhance technology to improve service
Why	To improve efficiency and effectiveness of staff, to reduce tax increases, to increase productivity and to improve customer service and accessibility to services
Objective	Improve Asset Management and purchasing process
Why	To comply with legislation, to support funding opportunities and to improve budgeting decisions

What

Human resources: The CAO with input from senior staff will write a Human Resources Plan which considers an amended organizational chart identifying what new positions are required and which ones will be replaced, including the service-delivery justification for any additions, along with a timeline of implementation. This will ensure staff available to complete the work and accommodate increased workload from growth, ensure staff are appropriately trained, improve staffing capacity, clearly define roles, identify opportunities for contracted services and identify services that could be discontinued.

Technology: At regular management team meetings, the senior staff will consider optimization of existing processes and technology, consider new technologies being mindful of staff capacity and identify technology and best practices or processes to improve efficiency, effectiveness and productivity. This is an ongoing process which requires regular evaluation. The project will be driven by managers working with IT.

Asset management: The treasurer will improve the asset management strategic policy and all managers will understand and use the plan.

Timeline

2019 Q2	Asset Management Plan	Strategic policy approval
2019 Q4	Asset Management Plan	Research and further development
2019 Q4	Corporate Health	Form project team and determine scope
2020 Q1	Human Resources Plan	Prepare plan in-house
2020 Q2	Human Resources Plan	Complete, approve and adopt
2020 Q2	Asset Management Plan	Identify service and risk levels
2020 Q2	Enhanced Technology	Revise Purchasing Policy, including E-bidding and demonstrated accountability, efficiency, transparency
2022 Q1	Asset Management Plan	Expand assets to agree with Development Charges background study
2022 Q1	Asset Management Plan	Complete, approve and adopt
2021-2023	Human Resources Plan	Implement
2021-2023	Corporate Health continuous improvement in asset management, technology and human resources	Management discusses at regular meetings to include corporate health considerations in annual draft budget for presentation to council

Quick Wins

- Management team will work with a mindset of continuous improvement
- Identify immediate needs for staff inclusion in 2020 budget
- Identify staff efficiencies that assist with current workload and modernize services such as in-field technology like tablets
- Optimize new technology software already purchased such as e-Scribe and CGIS

- Staff training in asset management
- In-house presentation and an open house on asset management
- Gather other municipal purchasing policies and asset plans for research
- Choose suppliers that provide training with their software
- Schedule training sessions in down time to avoid overtime and burn-out
- Council to attend asset management training when attending conferences

Resources Needed

Budget for upgrades, increase IT capacity, staff training

Goal	Community and Economic Development
Objectives	Develop and implement a Community and Economic Development Plan
Why	To guide community and staff in community and economic development over the next three to five years

What

Develop a Community and Economic Development Plan that will identify and allow for development of strategic community projects using information gathered through a Recreation Master Plan, will take on economic development initiatives, consider the development of social programs, guide development of employment lands, consider preservation of the Natural and Built Heritage and consider community engagement including newcomers and intergenerational people as well as civic engagement that encourages civil discourse. Implement the plan with a variety of willing partners in leading or supporting roles.

Timeline

2019 Q4	Community and Economic Development	Form a project team to determine scope
2019 Q4	Community and Economic Development	Issue and award RFP for Recreation Master Plan
2020 Q2	Community and Economic Development	Complete, approve and adopt Recreation Master Plan
2020 Q3	Community and Economic Development	Issue and award RFP for Community and Economic Development Plan

2020 Q4	Community and Economic Development	Complete, approve and adopt Community and Economic Development Plan
2020 - 2023	Community and Economic Development	Implement Recreation Master Plan
2021 - 2023	Community and Economic Development	Implement Community and Economic Development Plan

Quick Wins

- Gather project team to provide input to Community and Economic Development RFP process and plan, determine scope
- Accept the offer of LGL Health Unit Healthy People, Vibrant Communities to lead community consultation
- Further engineering for employment lands at Highway 7 and Highway 15 this year
- Complete engineering designs Costello Drive

Resources Needed

Budget, consultant, may need a project officer for this initiative

CONCLUSIONS

This is an ambitious plan which aims to balance the tremendous residential and business growth occurring in Carleton Place with its impact on the community. The work called for in the Corporate Strategic Plan is in addition to the full work capacity already being seen in all departments. The capital works are in addition to the capital projects identified in the [2018 to 2027 Long-term Financial Plan](#). This is the cost and benefit of growth.

Annual reviews are required to keep the plan on track and to consider if adjustments are necessary. Annual reporting will demonstrate the plan's scope and achievements, transparency and accountability.

Significant plans, reviews and studies are called for in this strategic plan and additional actions including human resources, capital projects and budget impacts will be identified through the process of the plans including:

- Communications Plan
- Human Resources review
- Recreation Master Plan
- Intensified Housing study
- Community and Economic Development Plan
- Asset Management Plan
- Official Plan

Public consultation and community input will be needed to complete many of the plans, reviews and studies called for in this Strategic Plan including:

- Communications Plan
- Recreation Master Plan
- Community and Economic Development Plan
- Development Charges background study
- Affordable Housing forum
- Official Plan
- Development Permit By-law

The Strategic Plan is a living document. Timelines are flexible and will be adjusted as new plans and studies identify emerging priorities. This is an exciting time of growth, prosperity and success for Carleton Place. The Carleton Place Council and staff, proudly working for and with the people of Carleton Place, are strategically planning for and balancing that growth. The community-focused council values accountability, integrity, transparency and collaboration for the fulfillment of all. The Corporate Strategic Plan demonstrates their good governance through progressive leadership to residents and businesses.

