

December 11, 2019



Town of Carman STRATEGIC PLAN

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Introduction

Beginning in the Spring of 2019 and continuing through the summer and fall months, the Town of Carman undertook an extensive and comprehensive process to develop a five-year Strategic Plan. The Town of Carman Council recognized the need to map out its future course and help guide its decision making into the new decade. The Town of Carman partnered Backswath Management (formerly Pivot Performance) to help guide the process. A combination of the Council and office staff met several times over the spring, summer and fall months to continue build and define the Strategic Plan.

- Kick-Off Meeting – April 2019
- Community Survey – May 2019
- Stakeholder Interviews – June 2019
- Briefing Book Presentation – June 2019
- Retreat – September 2019
- Action Planning - October 2019
- Final Presentation - November 2019

The Plan includes a clear Vision, Values and Tag Line to both ground the organization in its purpose as well as establish where it wants to be in 2025. A comprehensive set of Strategic Goals, Objectives, and Measures were also established to help the Town of Carman define the route they want to use to get to that end result. A list of Strategic Projects was also developed to help the Town of Carman achieve those Strategic Goals and ultimately its Vision, while at the same time making sure they are on the right track.

A Strategic Plan is a living, breathing document that acts like a guide to help make sure everyone and everything are pulling in the same direction. It must be continually monitored, revisited, and – if necessary – revised to ensure the desired goals are being achieved.

On the subsequent pages, you will find:

- The Town of Carman 5 year Strategic Plan consisting of:
 - Vision, Values, Strategic Goals, Objectives, Measures and Strategic Priorities
- Appendices:

Backswath Management appreciates the time, effort, and dedication by the Council and the Town staff in developing this Plan.



Strategic Plan

Vision

The Town of Carman is a progressive place to live a full and complete life with engaged citizens and partners.

Tag Line

Carman is bloomin' great!

Values

- Integrity – adhering to principles, values and promises
- Trust and Transparency – having the confidence that people’s intentions are good and that the required information will be shared
- Open-minded – respecting the opinions of our community, understand, be flexible and open to change
- Respectful – listening to our citizens
- Reliable – delivering services consistently in quality or performance

Strategic Goals

Growing the Community	Increasing Economic Development Opportunities with Planning	Prioritizing Infrastructure	Developing Recreation Opportunities	Enhancing Amenities
<ul style="list-style-type: none"> • Scaling and aligning services to align with population increases • Expanding public, personal, active and commercial transportation • Aligning housing with our population’s needs and wants 	<ul style="list-style-type: none"> • Expanding industrial park • Ensuring business retention and expansion • Coordinating an approach to planning and community growth • Building on our strengths (i.e. tourism, agriculture, events and business meetings) • Developing partnerships 	<ul style="list-style-type: none"> • Implementing and communicating the asset management plan • Defining infrastructure projects 	<ul style="list-style-type: none"> • Promoting existing recreation opportunities • Renewing, enhancing, and revitalizing <ul style="list-style-type: none"> ○ pathways ○ hub/host ○ arts, culture, theatre ○ beautification ○ parks ○ greenspaces 	Promoting: <ul style="list-style-type: none"> • Retaining medical professionals • Adding to existing professional services, health and wellness and social programs • Establishing a trade program • Adding variety to available accommodations

<ul style="list-style-type: none">• Developing engaged citizens across all population groups			<ul style="list-style-type: none">• Evaluating new opportunities	<ul style="list-style-type: none">• Increasing the number of childcare spots
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Strategic Goals

This is an accountability tool. How to you measure the accomplishment of each goal. A Critical Success Factor is something that must be in place for the Town of Carman to achieve the goal. A Barrier is something that must be removed.

Growing the Community	
<ul style="list-style-type: none"> • Scaling and aligning services to align with population increases • Expanding public, personal, active and commercial transportation • Aligning housing with our population’s needs and wants • Developing engaged citizens across all population groups 	
Critical Success Factors <ul style="list-style-type: none"> • Offer a public pay-per-use transportation option. • Growing community foundation • <i>Clarity on the population gaps for your ideal growth trajectory.</i> 	Barriers <ul style="list-style-type: none"> •

Objectives	Measures	Baseline 2019	2020		2021		2022	
			Budget	Actual	Budget	Actual	Budget	Actual
1. Population increases to 5000 by 2040	Dir of Ec Dev 100 people/year or 5.3% growth	3000						
2. An increase in transportation options (i.e. not all personal vehicles) for all ages	Dir of Ec Dev							
3.	Planning District Housing development – -starts -occupancy -type -time on market							

Objectives	Measures	Baseline 2019	2020		2021		2022	
			Budget	Actual	Budget	Actual	Budget	Actual
4. An increase in people providing input to Town of Carman	Selecting a group of community committees and looking at vacancy and refresh on an annual basis CAO – subjective/qualitative Growing response in community proposing							
5.	Dir of Ec Dev Net new jobs (drill down capabilities to understand where the jobs were created)							

Increasing Economic Development Opportunities with Planning	
<ul style="list-style-type: none"> • Expanding industrial park • Implementation an approach to business retention and expansion • Coordinating an approach to planning and community growth • Building on our strengths (i.e. tourism, agriculture, events and business meetings) 	
Critical Success Factors <ul style="list-style-type: none"> • <i>Understanding current tax base mix and setting a target for future mix.</i> • <i>Volunteer base in place to accommodate increase in events.</i> • <i>Incentives to attract the desired businesses.</i> • <i>Workforce and business growth are aligned.</i> 	Barriers <ul style="list-style-type: none"> •

Objectives	Measures	Baseline 2019	2020		2021		2022	
			Budget	Actual	Budget	Actual	Budget	Actual
1. Industrial park has been increased by 50% within x years	Lot sold/size							
2.	commercial permits							
3.	Business licenses							
4. 0 empty store fronts								
5. Number of locally owned businesses	Business licenses issued							
6. Decrease in conditional use and variances	Coordinator of Planning							
7. Increase in the number/size of events we host	Type of events hosted (1-time \$ injections vs. Professional/Economic Dev events)							
8. Number of formal partnerships	MOUs							

Prioritizing Infrastructure	
<ul style="list-style-type: none"> • Implementing asset management plan • Defining infrastructure projects 	
Critical Success Factors <ul style="list-style-type: none"> • <i>Infrastructure to support 5K people and desired commercial tax base</i> • <i>Having the staffing complement to complete the asset management plan.</i> • 	Barriers <ul style="list-style-type: none"> •

Objectives	Measures	Baseline 2019	2020		2021		2022	
			Budget	Actual	Budget	Actual	Budget	Actual
1. Asset management plan is implemented by December 2020	Dir of Finance							
2. Projects are completed on time and on budget	CAO							

Developing Recreation Opportunities	
<ul style="list-style-type: none"> • Promoting existing recreation opportunities • Renewing, enhancing, and revitalizing <ul style="list-style-type: none"> ○ pathways ○ hub/host ○ arts, culture, theatre ○ beautification ○ parks ○ greenspaces 	
<p>Critical Success Factors</p> <ul style="list-style-type: none"> • <i>Having a collaborated approach to the community's recreation goals and needs.</i> • <i>Clarity around the recreation programs to be offered by the Town.</i> <ul style="list-style-type: none"> ○ <i>List of what core, nice to have, won't do</i> • <i>Having the infrastructure to accommodate the desired recreation activities.</i> 	<p>Barriers</p> <ul style="list-style-type: none"> • .

Objectives	Measures	Baseline 2019	2020		2021		2022	
			Budget	Actual	Budget	Actual	Budget	Actual
1. Have a clear plan on what ToFC will invest in year or year.	Dir. Of Rec Services Aligning with capital management plan.							
2. Allocate x\$ per year to beautification projects	CAO							
3. Revenue generated from community hall, rink and pool meets capacity targets/breakeven	Dir of Finance							
4. New developments are equipped with the pathways.	Planning							

Enhancing Amenities	
<ul style="list-style-type: none"> • Supporting the community in advocating for: <ul style="list-style-type: none"> ○ Retention of medical professionals ○ Enhancement of existing professional services, health and wellness and social programs ○ Access to a trade program ○ Increase in childcare spots 	
Critical Success Factors <ul style="list-style-type: none"> • <i>Nurturing relationships with key officials and key administrators.</i> • <i>Adequate number of trained childcare professionals.</i> • <i>Business case to support the addition of recovery rooms.</i> • <i>Schools secure plans and funding new middle school</i> • <i>Trade Program</i> 	Barriers <ul style="list-style-type: none"> •

<ul style="list-style-type: none"> ○ <i>Pre-program - plan in place, milestones, on track/budget</i> ○ <i>Program in place - # of students graduating/enrolled/applying</i> 	
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Objectives	Measures	Baseline 2019	2020		2021		2022	
			Budget	Actual	Budget	Actual	Budget	Actual
1. X childcare spots available	Dir of Finance Increase in spaces available annually							
2. Reduction in wait time for childcare	Dir of Finance Wait time for childcare is reducing							
3.	Council Trade opportunities through co-ops							
4.	Health Centre Board Maximize surgery with an increase in recovery beds.							
5.	Dir of EcDev Have enough spaces for the events that we are hosting based on the amenities we currently have.							

Strategic Projects

Priority strategies are the key activities that must be completed in order to journey towards the Vision and achieve the Strategic Goals as measured by the objectives and key performance indicators.

Strategic projects are listed in a separate Excel document and prioritized by quarter. Each of the strategies will be further broken down and assigned to various people on the team. Best practices suggest that the following number of projects be assigned by role:

- Leadership 5 – 7 projects
- Management 3 – 5 projects
- Team Members – 1 – 3 projects

A project is a priority if you are ready to provide the resources, time and money to get it accomplished.

- Essential – A project is essential if you have or are ready to make available, the resources, time and money to get it done.
- Important – A project is important if you have two of the three (resources, time and money).
- Nice-to-have – A project is nice to have if you have one or none of the three available.

NEXT STEPS – will be for Administration to categorize each of the projects listed below and assign them to a leader. The leader should be someone at the director/management level.

Strategic Projects	Who is Leading It	Timelines						
		O/N/D 2019	J/F/M 2020	A/M/J 2020	J/A/S 2020	O/N/D 2020	2021	2022
1. Approving and presenting the strategic plan.	CAO/Council	Dec 17/19						
2. First Monthly Strategy Meeting	CAO		Jan					
3. Capital asset management plan. <ul style="list-style-type: none"> a. Rating the priorities. b. Costing them out. c. Street revitalization plan d. Equipment replacement e. Sewer and Water 	Judy					Dec		
4. Amalgamate planning district. <ul style="list-style-type: none"> a. Submit to Minister by... 	Coordinator of Planning				July			

5. Drought planning.	Executive Committee					Dec		
6. Advocating for the trade school	EcDev							

Corporate Key Performance Indicators

Key Performance Indicators (KPIs) are used to evaluate the current position of Carman based on the key drivers for success. An Excel spreadsheet summarizes the most important corporate KPIs, how they will be measured, who owns the outcome/results, who will generate the report, how often it will be generated.

- **Key Performance Indicators** measure the overall organizational success. They are the (approximate) top 10 things the Town of Carman should be monitoring regularly to indicate the “health of our organization”.
- **Objectives** track our progress for each Goal specifically. There may be overlap between KPIs, Objectives and Metrics.
- **Metrics** are ground level targets, often department or task specific. Their results often roll-up into a Key Performance Indicator or an Objective.

KPI	How will it be measured	Owner (Person responsible for interpreting the data)	Who generates the KPI	Frequency Week Month Quarter Annual
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Appendix A: Community Survey

In the Fall of 2019, the Mayor, Council and the Administration Office will be developing a 10-year Vision for the community. In preparation for their planning meeting, they asked the Town of Carman to complete a survey as they were interested in hearing their opinions on a number of topics. The summarized results are shared in this document. The detailed survey results are available upon request.

Total Responses – 168

Question Summary

Q1 Please indicate how important the following services are to your household. Rate each line.

Top 5 responses - Importance

1. Fire & rescue services – 89% (148)
2. Street repair & maintenance – 89% (147)
3. Snow clearing – 76% (126)
4. Economic development – 73% (122)
5. TIE – a) Parks, open spaces & playgrounds b) Garbage, recycling & leaf collection 70% (117)

Top 5 responses – Unimportant

1. Building inspections and permits – 20% (33)
2. Arts, cultural & heritage programs – 17% (28)
3. Website and social media – 14% (24)
4. Floral and landscaping on public property – 14% (23)
5. Bylaw enforcement and policing – 11% (19)

Q2 Please indicate your satisfaction with each of the following services.

Top 5 Responses - Satisfied

1. Fire & rescue services – 89% (147)
2. Garbage/recycling/leaf collection – 60% (100)
3. Street cleaning – 58% (96)
4. Snow clearing – 56% (92)
5. TIE a) Parks, open spaces, & playgrounds b) Floral/landscaping on public property – 48% (79)

Top 5 Responses – Unsatisfied

1. Street repair/maintenance – 40% (66)
2. Economic development – 28% (46)
3. Land use planning – 25% (41)
4. By-law enforcement and policing – 18% (29)
5. Garbage/recycling/leaf collection – 10% (16)

Looking Deeper into Question 2 – how unsatisfied are those who rated these services as “very important”?

- Street repair/maintenance “unsatisfied” went up to 44% when responses filtered to only those who deemed it as “very important”
- Economic development “unsatisfied” went up to 33% when responses filtered to only those who deemed it as “very important”
- Land use planning – no change
- By-law enforcement and policing “unsatisfied” went up to 30% when responses filtered to only those who deemed it as “very important”
- Garbage/recycling/leaf collection – no change

Q3 Identify the preferred way you learn about municipal issues. Check all that apply.

Top 5 Responses

1. Website – 60% (97)
2. Town of Carman Facebook – 58% (95)
3. Social Media – 56% (91)
4. Newsletter – 46% (71)
5. Newspaper – 46% (71)

Looking Deeper into Question 3 – how does age affect the way they prefer to learn about municipal issues?

- For respondents 65+, they prefer to learn about municipal issues via newsletter and newspaper (tied at 77%)
- For respondents 55-64 – they prefer to learn about municipal issues via website (69%)
- For respondents 45-54 – they prefer to learn about municipal issues via website and facebook (tied at 76%)
- For respondents 35-44 – they prefer to learn about municipal issues via social media (61%)
- For respondents 25-34 – they prefer to learn about municipal issues via facebook (67%) and a close second is social media (64%)
- For respondents 18-25 – they prefer to learn about municipal issues via social media (100%)

Q4 Considering the Town of Carman receives property tax paid by a resident for each of the following services, identify what you would like to see happen.

Top 5 Responses – Increase Funding

1. Street repair/maintenance – 72% (120)
2. Economic development – 44% (71)
3. Parks, open spaces, & playgrounds – 36% (60)
4. Sidewalks & street lighting – 30% (50)
5. Fitness/recreation facilities and programs – 28% (47)

Top 5 Responses – Maintain Status Quo

1. Website and social media – 85% (141)
2. Storm-water draining and flooding – 80% (132)
3. Garbage/recycling/leaf collection – 78% (129)
4. Street cleaning – 77% (127)
5. Building inspections & permits – 75% (124)

Top 5 Responses – Decrease Funding

1. Building inspections & permits – 22% - (36)
2. Arts, cultural & heritage programs – 20% (33)
3. By-law enforcement and policing – 10% (17)
4. Land use planning – 10% (16)
5. Street cleaning – 10% (16)

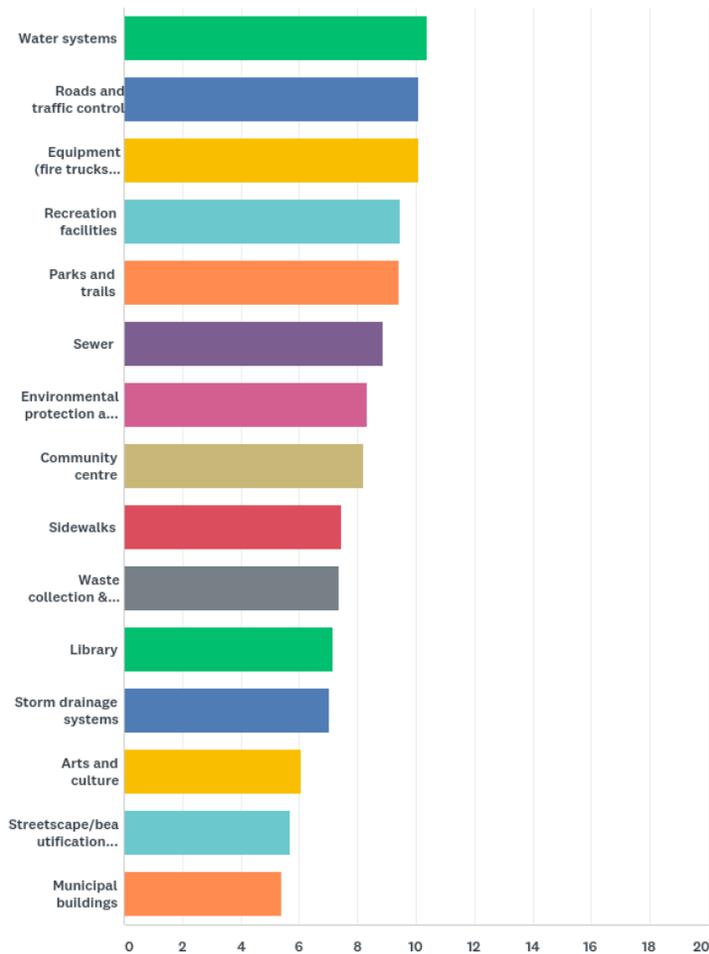
** most responses showed a strong combination of “increase and maintain”, or “decrease and maintain”. However, a few answers stood out as somewhat split opinion – Arts Culture and Heritage (24, 109, 33), Land use Planning (29, 120, 16), Street Cleaning (23, 127, 16)

Q5 If faced with the following choices, what would you advise Council to do?

- Maintain or increase existing services primarily by increasing user fees for services – 44% (72)
- Maintain or increase existing services primarily by increasing property tax rates – 23% (37)
- No opinion – 23% (37)
- Reduce services to maintain or decrease current property tax rates – 11% (18)

Q6 The Town spends a portion of its yearly budget on large projects, known as capital projects. Imagine that you had \$100 to spend on the following capital projects. How would you spend it? Put your choices in order of priority.

The following chart is the aggregate priorities for all survey respondents.



Looking Deeper into Question 8 – how does age affect the way they prioritize capital spending?

For respondents 65+ – their top three priorities for capital spending are:

1. Water systems
2. Roads and traffic control
3. TIE – a) Community centre b) Environmental protection and enhancement

For respondents 55-64 – their top three priorities for capital spending are:

1. Roads and traffic control
2. Water systems
3. Streetscape/beautification projects

For respondents 45-54 – their top three priorities for capital spending are:

1. Roads and traffic control
2. Water systems
3. TIE – a) Equipment (fire trucks, graters, etc). b) Parks and trails c) Recreation facilities

For respondents 35-44 – their top three priorities for capital spending are:

1. Water systems
2. Recreation facilities
3. Environmental protection and enhancement

For respondents 25-34 – their top three priorities for capital spending are:

1. Water systems
2. Recreation facilities
3. Roads and traffic control

For respondents 18-25 – their top three priorities for capital spending are:

1. Community centre
2. Recreation facilities
3. Roads and traffic control

Q7 How important do you believe the following issues will be for the Town of Carman?

Top 5 responses – Very Important

1. Healthcare services – 85% (139)
2. Quality of the roads – 76% (125)
3. Local economy/jobs/unemployment – 71% (115)
4. Crime/safety/violence – 67% (111)
5. Taxes – 62% (101)

Top 5 responses – Not at all Important

1. Affordable housing – 13% (21)
2. Environment – 9% (15)
3. Childcare – 9% (14)
4. Issues related to growth – 6% (10)

Q8 Based on your vision for the future, what are your expectations of the Town of Carman?

Open-ended question – 119 written responses (see appendix for all answers)

Word Count Analysis

- Growth (19) Grow (14) (33?)
- ~~Town (28)~~
- Growth (19)
- Community (18)
- Businesses (17)
- ~~Carman (15)~~
- Grow (14) (repeat?)

- Better (12)
- Services (10)
- ~~Need (10)~~
- ~~Will (10)~~
- ~~Keep (9)~~
- ~~Bring (9)~~
- Jobs (9)
- People (9)
- ~~See (8)~~
- Families (8)
- ~~Continue (8)~~
- Taxes (7)
- Affordable housing (6)
- Safe (6)

Q9 How old are you?

- 35-44 – 27% (45)
- 25-34 – 20% (33)
- 55-64 – 18% (30)
- 65+ - 17% (28)
- 45-54 – 10% (17)
- 18-24 – 7% (11)
- Under 18 – 0% (0)

Q10 Do you rent or own the place where you live?

- Own – 91% (150)
- Rent – 7% (12)
- Neither – 1% (2)
 - Live with my parents
 - Moved away from Carman

Q11 What type of dwelling do you live in?

- Single detached house – 89% (145)
- Apartment – 2% (4)
- Condominium – 2% (4)
- Other (see breakdown below) – 6% (10)
 - Acreage
 - Farm

- Side by Side (4)
- Mobile Home (3)
- House

Appendix – Question 8 Based on your vision for the future, what are your expectations of the Town of Carman?

119 responses to this question

- To maintain and grow services in the community.
- Growth
- No more floods. Better inclusion programs in schools. Increased health services for aging population.
- Continued growth, and increased taxes to compensate.
- Be transparent. Be willing to listen. Support new ideas. Make a plan for growth of the community.
- I just moved here over a year ago, but in my opinion I think road maintenance needs to be a big priority and making childcare s priority also as I've been on the wait list since I moved here. I think in the future It would be nice to maybe have town meetings for issues to be discussed. Besides that maybe another grocery store, otherwise overall it has been fantastic living here.
- Create a sustainable future for all citizens.
- Continues growth and looking after the vulnerable (aging, poverty, housing)
- Better road maintenance / cleaning. More jobs.
- Affordable housing, invest in the library a service that welcomes all.
- That the town target young families, not have seniors be the target market.
- Actively pursue and attract businesses and people to Carman
- Need to improve the business climate in carman
- Build and grow. We're no longer just a retirement community.
- We would like to see more jobs and recreations to bring in tourists.
- Growth & change.
- Pleasant, safe, well maintained community
- Industrial Town with beautiful parks/trails with lots of choice when looking for recreational activities
- Economic growth to keep taxes affordable.
- Stay the course
- Expanding services to community to attract new families to move here.... need to attract new business to area..
- If the taxes keep going up, don't worry about growth
- Better parks - a dog park should become a fundraised event.
- Don't expect the residents of the R.M. to pay for town amenities
- bring in new businesses and start growing the town
- Be open to change

- It would be nice to see some growth, everything has closed or is closing, any type of commercial development, so the property owners aren't paying all the bills. Maybe industry to provide employment.
- Ensure quality water and services, while keeping property taxes in check.
- Better service for the increased mil rate !
- On the right track. Beautiful vibrant growing place to live.
- Functionality, not Beautification.
- Would love to see More activities for teenagers (especially summer holidays) that may not be into sports. Perhaps a daytime art Or music program. I dont know If Thats something the town would take care of, but it's a thought.
- Affordable taxes, do not expropriate land
- More businesses
- More healthcare and affordable housing for elderly even though it should also be towards young adults
- To grow, bring more people to town, not just be a retirement Center, a lot of young people here with everything catered to the elderly. Have all the roads be decent.
- Must be an affordable community to live in. Carman needs to attract young family's in order to survive.
- A safe, we'll looked after , friendly, community. Senior friendly,.
- Driving more corporate business
- Town is doing well. More town beautification needed
- I would love to see the town of Carman continue to attract business and hold the young families that reside here. The senior population will continue to be stable, if not grow, but I am hopeful that we can encourage more growth in the local economy here.
- Work towards a viable & vibrant community
- My vision for the Town of Carman is to become more accessible for residents with scooters or wheelchairs. I have only become aware of this as someone in my family is restricted from going into restaurants because of accessibility.
- In the future, I would expect Carman to continue to grow and flourish. This will happen if there are jobs available to attract families to Carman. There must be affordable housing for all levels of income earners and retirees.
- To continue to grow and make changes to keep Carman relevant
- A community that is known for more than being a retirement community and known for the employment opportunities it has because of new business.
- Continued repair of infrastructure and growth through economic development, more incentive to bring in high paying jobs
- Attract new industries and job growth. Our town is not able to keep your youth because we lack jobs at all levels of expertise. Without growth our taxes will weigh heavy upon us all, primarily the lower fixed income individuals.
- Bring more businesses to Carman

- Create a community my children may leave for a time but will return and will want to raise my grandchildren in. A place where families can thrive, jobs that provide for families, programs that support families...and therefore support growth and community etc.
- To be a quiet and quaint town to retire in
- Better communication.
- To attract a younger group with jobs, affordable housing, good education and excellent recreation opportunities.
- Growth
- Growth and Development
- Find ways to bring better/more successful businesses to the area. Inclusion of all age groups and demographics.
- Spend money wisely, cut administration costs, if you need to spend money to save money in the long run, do it.
- Sustained growth through smart spending and planning.
- Grow, attract working people
- To attract new people, grow and sustain the community
- To pursue top grade technology to encourage next generation to live here; to engage with citizens in community projects acknowledging that they are a wealth of resources; take real pride in the volunteers & their contribution to the community (willingly support financially when approached to do so); fir Council members to be visible in the community(support by attending events); encourage diversity by supporting newcomers from other countries to live in our community. Keep up the good work you fo; it is mot always easy!
- Have a plan based on economic development and not just tourism
- Fix ALL OF THE STREETS in town already!!! If I receive damage to my vehicles due to the road conditions, i will start sending the town my repair bills!! Also I'm getting sick and tired of the semi trucks coming into town at all hours and using their engine brakes!! It's illegal and noone does a thing about it!! There should also be much better internet service at a more reasonable rate. The town should also allow more stores to open in town. Especially another grocery store. Co-op is far too expensive and it definitely prevents me from spending what little money i have in town!! There should be a timeframe at the 30 zones in front of the schools just like every other town in Canada!! Lastly the price to bring garbage to the dump is WAY TO EXPENSIVE!! I have a small truck and i have to pay the same amount as a large one!! That is absolutely crazy!! Even the price for a half ton is way too much!! Almost every other town there is no charge to bring to the dump!!
- To be an affordable, safe community for my family for live in.
- Become a safer community with less crime.
- a safe, affordable and pleasant place to live
- To continue to make improvements for facilities such as the library and parks, to continue to support local emergency response teams, to improve roadways and water supply/maintenance concerns.
- Less crime and a better Recycling Center

- Health care services, re-using & recycling for the environment, public transportation for low income people, the elderly & those with no vehicle, & to reduce the use of fossil fuels, more electrical stations to recharge electric vehicles. ple ie
- Bring more industry to area creating more jobs and hence more economic opportunities
- Attractive town.. spend less on watering flowers and more on pulling weeds. with steady economic growth
- To continue to grow infrastructure instead of just maintain, to become a community of choice for people and businesses
- Activities for children in summer and winter. Affordable housing and taxes
- economic growth, maintaining existing services, maintaining our safe community
- to operate within their budget
- That council will continue to bring in policies such as better internet service as they have, job creation, shop at home promotions, support for library, local programs and infrastructure to help the community grow and provide hope for the future of our youth to help keep our community safe. Addiction and mental health services should also be supported. Job creation, affordable housing and good programs are important to sustain and grow our community.
- Use of social media to bring more working age people to live in the community
- I would like the town to grow with the increasing population, for example more businesses be allowed open on sundays, encourage new businesses to want to come to Carman. Help with crime increasing everywhere, and stop raising property taxes so much.
- Would like to see some much needed sidewalk, roads and sewer repairs! They are in horrible condition
- That Carman would grow in economic developments and business and grow their tax base with increased jobs and opportunities for income grow the town , grow the tax base, grow the infrastructure
- Planning for the future not this years budget.
- more businesses, better sidewalks, landscaping and flowers in public spaces, new playground, upkeep of waste services and snow clearing
- Industrial growth
- Allow business growth. It's not always about sports. Everyone isn't into sports!! Carman really needs community policing.
- Invest in recreation and parks
- To focus on taking care of itself. Maintaining what we have well. Creating more jobs...
- Growth, innovation
- None
- Maintain
- Safe place
- Continue making our community family friendly
- Solid recreation plan, too many organizations fundraising for their own projects, we should have one recreation board that handles all, golf, hockey, curling, baseball, memorial hall...dog with too many heads

- I want to see Carman grow & keep jobs local. Do not hire companies from out of town to do jobs our residents can do
- Would like to see the town justify its expenditure and curb some of its costs
- Forward thinking. Planning for the future. Encouraging economic and service development. Helping small businesses succeed
- Safer environment for young families, more affordable recreational stuff for kids.
- I would like to see the seniors home go ahead, just not on the land that was unfairly expropriated from the owners. Shame on the town for allowing this to happen. The way the land owners were treated is a disgrace to our town. They went out of their way to be accommodating in the past and this is how they are treated. SHAME ON YOU!!
- Build a stronger community through connection of its citizens.
- I expect the town to bring in more industry by making carman an investment friendly town
- I am from the city and what I have seen in carman and feel needs to be done is growth more business ,lighting on trails as well as paved sidewalks ..and taking garbage to the dump should be either free or cheaper
- To listen to what the majority of the town wants and spend our tax money wisely
- More job opportunities for high school kids year round
- That changes will be made to the water system. Many members of the community are upset with the low quality of it, and I think the Town knows this and will work on making it better.
- More money to help families. Daycare, recreation
- Health care
- Offer more activities for younger and middle age residents.
- To clear snow and clean streets of ALL condo areas through the taxes that all pay
- The town needs to put itself in a position to be a consideration for businesses and families to come into by securing the resources necessary to do so.
- To keep evolving. Inspire the graduates more to want to come back and have hope for jobs
- A place people want to come to.
- Strong focus on economic development
- Infrastructure renewal.
- Town roads improved. Economic growth, why are so many business for sale??? Something must be done
- IMO, to grow Carman will need to entice business and then require affordable housing for workers. With the increasing immigration to Carman the town should consider developing resources for these families.
- We need to attract more business. I don't know what our economic development officer is doing but it can't be much. All we see are empty buildings and business leaving town.
- To do their best in all areas with the tax base as is
- To continue to be a family friendly town
- We need to encourage growth and support the businesses and people in this town. Give people a reason to move here and give businesses a reason to move here. With property taxes as high as they are it will be difficult for people to move here and afford to build. If we don't support the

local businesses in this town then we will lose what's here and stop new businesses from moving here. This town is shrinking instead of growing, my highest expectation is to turn that around.

Appendix B - Town of Carman Stakeholder Interviews

A series of interviews were held with stakeholders. The stakeholders were all asked the following questions:

1. Describe the Stakeholder Group you are representing.
 - a. What is the general purpose for the stakeholder group?
 - i. Are you an organized group? If yes, who is your membership?
2. What are the key strengths of the Town of Carman as it relates to your group's purpose? Why?
3. What areas need to be reinforced in the Town of Carman as it relates to your group's? Why?
4. Are there any opportunities for the Town of Carman that are not being maximized? Why?
5. What are the main areas of interest for your group as it relates to the Town of Carman? Why?
 - a. What is being done to support/promote those areas?
6. What are the main areas of concern for your group as it relates to the Town of Carman? Why?
 - a. What is being done to address those areas?
7. How would you describe the Town of Carman 10-years from now?

Their responses have been summarized below.

CARMAN SENIOR RESOURCE COUNCIL

Nancy McFarlane

- A very active group of seniors.
- Town is supportive providing a grant that covers the rent
 - Representation on the Board
- Pleased to see Assisted Living facility will be/is being built
- Home care is still a struggle, but it is in the hands of the RHA
- Seeking volunteers to take Seniors shopping
 - Would like to see younger volunteers
- Although it appears that Seniors are well cared for, it seems like they are coasting, she fears a fall-out of services.
- Concerned with staffing for the PCH

RM OF DUFFERIN

Sharla Murray and George Gray

- Town and RM collaborate. The relationship is positive.
- Demonstrated success and being used as a model in the province:
 - Shared tax dollars: Commercial and Residential
 - Services: fire, recreation
- Water/shared water is an area of concern considering the farming activity in the RM
 - Potato farmers, soy beans, greenhouses, etc.
- PCH is a positive for the community
- Great relationship between the Town and the RM, however is important to keep a distance between the two as well.

- Interested in seeing Carman continue to attract ag and ag related industry, commerce and retail to service farming community.
- RM views Carman as a retirement community and sees it as a strength. It gives their residents a place to go without being far from home.
 - The PCH will need a lot of staff, bring people into town, spending money
- Carman is a place to raise families.

CARMAN CHAMBER OF COMMERCE

Jodi Winkler and Kelly Dyck

- See more growth in businesses: industrial, commercial and retail as a way of “building it” so they will come.
- Consider providing tax breaks to entice business
- Focused business attraction strategy
 - What skills do we need to develop/attract
- Childcare is a challenge
- Accommodations in town need to be improved: hotel and campground
- Concern with the quality/quantity of water (real or perceived)
- Affordable housing, little to none under \$200K
- Roads are improving
- Industrial park should be closer to transportation route
- Perception that youth are not applying for jobs
- A strategic plan is a great way of creating alignment and clear sense of direction.
- Keep re-investing in the existing infrastructure.
- Find a way to make Carman less of a retirement community
- Create/attract/retain jobs for young professionals

DUFFERIN AG SOCIETY

Jodi Winkler and Dale Reimer

- View themselves as a promoter of Carman to Manitoba.
 - They are the biggest event.
 - Accommodations are lacking.
- They own a lot of property that could be better utilized throughout the year.
 - As they are a volunteer-run organization, they would like to collaborate with another group (i.e. Town) to make this happen.
- Seeking ways to improve their funding model.
 - Exploring Morden Corn and Apple Festival and others.
- Concerned with the vacant retail stores.
- Carman has the Coop Administration Offices, employing a large number of people!
- Would like to understand the Town’s focus on tourism vs economic development
- Suggesting that Town clarifies what lands are available for what type of industry/commercial/retail
- Would like Town to share/inform the public on the water supply

- What is the current state of water?
 - What are the real concerns?
 - What are the possible scenarios
- The Future of Carman? What do we want to be and let's work towards it. We are going to be the place to be or we are going to be a bedroom community, let's make a decision.

YOUTH FOR CHRIST

Tyler Friesen

- 75 “unique faces” that participate in their activities
- Sees the community as very supportive. Fundraising is never difficult.
- There are still people living in poverty. It is difficult to see. Often single parents with kids.
- Provide services for vulnerable kids, help them transition from school to employment
 - Mental health
 - Someone to talk to
 - Homework assistance
 - Find work
- Employment opportunities for the transition years
- Mentorship opportunities for the kids on the fringe
- There are plenty of sports and recreation opportunities
- Youth is the next generation – how do we make sure they come back after school or stay in the first place

Appendix C - SoWOT+ Analysis

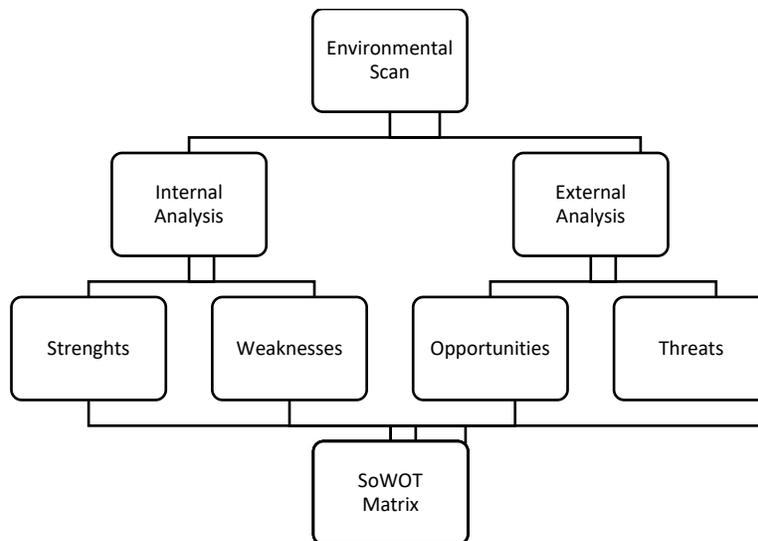
In preparation for the Town of Carman’s planning session scheduled for September 19th and 21st in Carman, please read the consolidated SoWOT+ results prior to the session.

Why Complete a SoWOT+ Exercise?

The SoWOT+ exercise was developed to make it easier for participants to systematically reflect, review and interpret relevant data to identify internal strengths and weaknesses and external opportunities and threats.

The following exercises make it easier understand the “so-what” in the SWOT (strength, weaknesses, opportunities and threats). The organization gathers information about the external world, its stakeholders and itself, and identifies the opportunities and threats that present themselves or can work towards creating them allowing them to live their Mission and achieve their Vision.

The SWOT analysis provides information that is helpful in matching the organization’s resources and capabilities to the competitive environment in which it operates. As such, it is instrumental in strategy and selection. The following diagram shows how a SoWOT analysis fits into an environmental scan:



The SoWOT Matrix

It is important to note an organization should carefully select the opportunities it would like to pursue. In some cases, the organization can overcome a weakness to prepare itself to pursue a compelling opportunity. Furthermore, the organization should also be aware of “real” threats that are even more threatening if accompanied by a weakness. To develop strategies that consider the SWOT profile, a matrix of these factors can be constructed.

SoWOT™

	Strengths	Weaknesses
Opportunities	S – O strategies	W – O strategies
Threats	S- T strategies	W – T strategies

- **S-O Strategies** pursue opportunities that are a good fit to the organization’s strengths
- **W-O Strategies** overcome weaknesses to pursue opportunities
- **S-T Strategies** identify ways that the organization can use its strengths to reduce its vulnerability to external threats
- **W-T Strategies** establish a defensive plan to prevent the company’s weaknesses from making it highly susceptible to external threats

PESTLE Analysis

A PESTLE analysis is a popular mnemonic tool used in business analysis. It can help you identify the circumstances that an individual, product/service, or organization finds itself in, which can help in making decisions and understanding its current or future position in the market. By systematically thinking through the following six areas (Political, Economical, Social, Technological, Legal and Environmental) the PESTLE tool will help the organization identify potential opportunities or threats.

Use the table provided below to complete your PESTLE analysis. There are no right or wrong answers. Record your top-of-mind ideas and be prepared to share them at the planning day. You do not need to provide a response to each bullet, they are there to help guide your thinking.

PESTLE		
	OPPORTUNITIES	THREATS
POLITICAL <ul style="list-style-type: none"> • Government policies • Government subsidies • Lobby/pressure groups • Federal or provincial influence • Future legislation • Stakeholders • Trends • Funding, grants, initiatives, etc. • Trading policies • Wars • Other 	<ul style="list-style-type: none"> • Funding • Innovation • Project lobbying • Possible additional funding or growth through programs forced on municipalities • Higher levels of government may eventually allow local municipalities to more flexibility in self government • To use guidelines • Increase funds • Influence decisions • Promote growth • Promote a green living through clean tech(electric cars or golf carts) • Influence growth (residential, commercial, industrial) • Entice new business • Motivate policies/by-laws • Grants direct capital projects • Fundraising for capital projects • Matching grants policy • Sunday shopping 	<ul style="list-style-type: none"> • Lack of funding • Offloading of programs and services from higher levels of government. Is happening continuously and forces municipality to spend funds trying to meet new guidelines developed by the higher two levels of government. • Costs associated with this downloading. Additional testing required, etc. • Curb or harper progress • Must be shovel ready • May eliminate paidle (?) groups • High hopes to succeed then not meet requirements • Non compliance with policy by Town of Carman Executive • Change of Govt Federal/Provincial • Implementation of Long Term Plans and Objectives delayed by inefficiency, lack of stewardship, vacillation, external influences. • Stymie growth • Create unnecessary unrest

PESTLE		
	OPPORTUNITIES	THREATS
	<ul style="list-style-type: none"> • We have a ton of groups/organizations in town • Provincial govt is so forward thinking • Safety, healthy co-funding projects • More & more controlling fed, prov, mun, private help with capital projects • Fed and Prov PC govt represent us well. • Local influence 	<ul style="list-style-type: none"> • Delay capital projects • Decrease grants • Alter social programs • Different thresholds for by products • Change in govt (funding changes) • Clear direction (cooks in the kitchen) • Costly small portion, getting less available • Small demanding groups • Expensive for small community • Less population, small percentage • Offloading of Province policy regarding lagoons, water plants, etc. making job more difficult to keep up with matters and regulations • PC fiscal policies may mean financial cuts
ECONOMICAL <ul style="list-style-type: none"> • Province's economy • Exchange rate • Job availability • Seasonal Issues • Other 	<ul style="list-style-type: none"> • Employment opportunities • Suitable workforce • Good paying jobs • Need to develop a network of people for the workforce • Future growth of residential and commercial • Need to find our niche and explore it • Influence spending • Growth in ag & industry • Recognise all opportunities whether subsidised or not. • Increased grant money 	<ul style="list-style-type: none"> • Poverty • Debt • Closeness to Winkler/Morden and Kenaston corner is always a battle when it comes to securing businesses. • Only being a bedroom community • False sense of security • Loss of sales • Not taking every opportunity for development of the community to increase our tax base and retain sustainability. • Decreased grant money

PESTLE		
	OPPORTUNITIES	THREATS
	<ul style="list-style-type: none"> • Helps businesses • Residential growth/kids stay in town • Traffic thru Carman to/from Pembina Valley • Deficit reduction, lower rate, increased tourism • Agri Business, hotel, - new biz opportunities • New jobs • Economic Dev. 	<ul style="list-style-type: none"> • Hurts businesses • Lack of availability • Location to city centre's • Affordable housing • Careers • Business closing • Sustainable employment • Higher taxation • Higher pricing of goods • Small labour force • Trouble getting qualified employees • Lack of workers • Competing with cities in region and Winnipeg • Lack of Awareness and benefits •
SOCIAL <ul style="list-style-type: none"> • Advertising • Brand image • Demographics • Buying trends • Immigration/emigration • Lifestyle • Living standards • Major events • Media views • Population shifts • Other 	<ul style="list-style-type: none"> • Expanded advertising • Hosting larger events • Enhanced immigration/migration • Variety of housing • Increasing population • Definitely made progress in this department. Brand has been developed. • Could strive for young families to increase school population, etc. • Could develop additional signature events to draw people into our community • Positive media stories to promote our area 	<ul style="list-style-type: none"> • Fear of change • Have not been proactive with immigration; however looking at communities south, they struggle with the fast growth. • Too strong of retirement community...not certain this is a threat • Needing volunteers to run a signature event. Seems to be difficult to get people willing to volunteer. • Community is always very slow to respond or purchase tickets for social events. Always wait to last moment. • Can we accommodate • Labeled "senior or retirement town"

PESTLE		
	OPPORTUNITIES	THREATS
	<ul style="list-style-type: none"> • Area is a rich farming area and town does have a number of retired farmers • Promote car ? area • Recognition • Work force • Current residents • Develop and build on our ability to create a niche in our marketplace through the use of social media and all technologies available in today's modern society. • Bring people to town for events • Appeal to travellers, remember us • Promote businesses • Get the word out to all • Growing Carman fair • Walking path • Recreation/sports club (awesome location in PV and province) • Handivan • Get more diverse population • Encourage foreign residents • Solid branding for Town/RM • Solicit immigration to fill jobs, grow community • Strong intergenerational mix • Town has many core services, like schools, hospitals, banks, motels, retail stores, car dealers, recreation, rinks, pool, golf and curling, etc • Carman Fair 	<ul style="list-style-type: none"> • Not becoming active in the marketplace and allowing the more progressive communities the opportunity to take our business. • Community events being cancelled (volunteers) • Our brand • Meth crisis (winkler, Portage) • Not a lot for youth to do on weekends • More crime • Lower income residents • Public is becoming more involved in social media and are become more demanding... seems to be an entitled society now • Costs • Not enough low income housing in town, need investors • Tired volunteer base • Can we balance needs for all? •

PESTLE		
	OPPORTUNITIES	THREATS
	<ul style="list-style-type: none"> • More families in town, along with the baby boomers 	
TECHNOLOGY <ul style="list-style-type: none"> • Technological replacements • Technological Innovation • Internet • Social Media • Web Applications • Mobile • Other 	<ul style="list-style-type: none"> • Enhanced interaction with ratepayers • Huge steps made with the fibre build by MTS and Valley Fiber in Carman • Competition may provide better cell phone service and internet service being cheaper for community • Includes? out accessibility to others • Improves opening up markers . • Create a marketing team • New opportunity for new business • New opportunity for new business and growth of existing • Connect to everyone • Communication • Tourism • More modern efficient operations • Better communication • High Speed Internet is coming to town, increased biz opportunities, attract new residents • Strong Social media presence in town to build on communications • 	<ul style="list-style-type: none"> • Social media trolls • 24/7 society • Social media users and their “opinions” dragging down all...”Carman Chat”. These applications are a cancer for the town and are only used as an outlet to complain – nothing constructive! • Website, although is not perfect, is becoming a better tool for public to use and register for programming and get knowledge regarding activities of the town. • Cost to keep up with change • Adding training required • Breach/hackers • Spam • Website • No newspaper soon? • Tremendously expensive • Doesn’t equally represent all ages • Slow set up • Expensive • At mercy of outside service providers •
LEGAL <ul style="list-style-type: none"> • Health and Safety laws • Environmental Regulations • Other 	<ul style="list-style-type: none"> • Opportunity to create a position that is dedicated part time to Health and Safety laws. This gives employment within the community and provides a safe work environment for the staff 	<ul style="list-style-type: none"> • Cost of creating a position to keep workers staff. • Government continuously changing the rules when it comes to water

PESTLE		
	OPPORTUNITIES	THREATS
	<ul style="list-style-type: none"> • Training for employees to make the town complaint – better workers – better job! • Attracts certain businesses • Fair by-laws • Residential protection • New guidelines are more positive – hearing tests done...trying to retain employees • Up to date procedures/policies 	<p>treatment, sewage treatment, sewer and water installations, etc.</p> <ul style="list-style-type: none"> • May discourage industries • Costly participation • Constant change to regulations • Expensive • Potential Liability issues with emergencies (CPS, Linear)
<p>ENVIRONMENTAL</p> <ul style="list-style-type: none"> • Weather • Recycling • Waste management • Attitudes toward and support for sustainability practices • Other 	<ul style="list-style-type: none"> • Year round composting • Opportunity to provide the waste management service to the community in more efficient ways. • Build on emergency planning for inclement weather incidents • Employment • Set a goal and focus • Clean streets • Encourage more recycling • More residents gaining understanding • Public are doing a great job at waste management and recycling compared to what was used to be done. • Conserve water • Lower cost service providers • Room for more buy in to conserve 	<ul style="list-style-type: none"> • Climate Change (weather extremes) • Lack of funding to provide waste management options. • Expense of disposing of waste because of government regulations • Cost to maintain • Keep on track to follow through • Traffic flow • Cost • Stricter regulations are very tough to meet. Even with the tools they give us, they are very tough to meet. • Dry weather cycle • Recycle maxed out, other service providers? • High Cost to supply water

Internal Review

Complete this section with information you already have. These are YOUR thoughts as it relates to the topics presented. This exercise is qualitative in nature. Assume that you belong to each of the “categories” listed below when you are exploring the questions. This allows you to take the respective category perception and provide feedback. This segment will facilitate the identification of Strengths and Weaknesses.

<p>MUNICIPALITY</p> <ul style="list-style-type: none">• What’s happening in the municipal world that you need to be aware of?• What are the shifting (current or upcoming) paradigms?• What are others finding successful that we need to consider?	<ul style="list-style-type: none">• We have always been innovative and willing to try things a little differently.• Changes of laws that affect the operation of the municipality• Alternate funding – hard to keep on top of funding opportunities and keep the day-to-day operations going.• Negative community views – social media and the constant bitcher• Keeping a positive team in place to move the community forward• Ways to find out what the community wants or needs• The last shift to data collection & how it drives change in our way steering growth & desire. Organizations both of population & people, business & health care. The spread between wealthy & poor. The loss of the middle class. Memorizing of social devices• Policy shifts• Changing demographic patterns• Community needs• Growth• Lots of trade jobs open but there are no training facilities in the area. Closest is in Winnipeg or Brandon.• Our citizens go way off the deep end and rebel against council but then they seem to retrack and agree. (How can we by pass this unnecessary drama)• Attracting new business• Attracting new residents• Amalgamation• Less representation• Larger municipalities• Read Municipal Magazine and get ideas and articles from that. That tries to keep you on top of things to be considered.• Shifting responsibility regarding water testing – new lines, water treatment, lagoon, etc. Governments continuing to increase requirements thus adding expense and work to local
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	<p>governments. Why do these two upper governments have two different standards...no clue why and how this possible.</p> <ul style="list-style-type: none"> • Federal and provincial elections • Could mean more funding cuts to town, or a forced merger? • Joint ventures are successful (with the RM, with private co.) • Citizens are leading the charge for more programs and services. This includes the recent library Reno, baseball diamonds, splash pad. •
<p>ORGANIZATIONAL ANALYSIS</p> <ul style="list-style-type: none"> • What are you doing well? • What could you be doing better (organizational structure, major functions, and activities)? • Trends in revenue, budget, employees, and staff size. 	<ul style="list-style-type: none"> • We work well within our established budgets and find ways to ensure we maximize outcomes without overspending. • Doing a decent job of providing services to the ratepayers • Working hard at maintaining service levels for all facilities • Great cooperation with all departments since the combining of different departments within the organization – ie; Recreation department becoming town employees • Great working relationship with RM of Dufferin • Providing the best services possible & managing our budget • Planning reforestation – better group as upgrades & direction. • Staff size continually increasing – retention of employees • The executive of the T of C are multi-directional and although tentative do tend to share some opinions openly with each other. • Proper staff are in place. Day to day takes care of itself • (This exercise will tell us that) • Revenues need to grow with increased business. Budget is always balanced and will grow with revenues. Serve our community well. Everyone does their job well to keep staff size proper. • Timely business • Be more involved • Everyone seems happy • No questions regarding tax pay money • Quiet office • Recreation service • Higher revenue, higher budget • More employees → larger staff → hard to fund • Always can organize better...made progress in this with last few councils.

	<ul style="list-style-type: none"> • Very efficient crew – struggling with getting everyone trained to meet the guidelines set by government. • Continue to work within budget with staff size we have. Try to maintain little or no overtime. • Clear roles and functions, reviewed recently • Shared staff with the RM • We need a succession plan for CAO • Need to build on strategic plan, and embrace the follow ups • Budgets continue to increase, need to grow in order to hold the line on taxation
<p>RESIDENT VIEWS</p> <ul style="list-style-type: none"> • What are we doing well? • What could we be doing better? • What needs do they have that aren't being fulfilled? • What future needs could we address? 	<p><i>(you could reread the survey and put some observations here)</i></p> <ul style="list-style-type: none"> • Could spend more on Streets/Infrastructure and Economic Development • Fire department and waste collection viewed well. • We seem to be getting the information out to the ratepayers. Need to keep working on getting the word out. Newspaper is not a logical choice any more because of the inconsistency of delivery and lack of content in paper. Not completely satisfied with website and it being user friendly; however it is becoming better. Need to work at keeping the tax bill down and develop a strategy for road improvements; sidewalks, etc. • Recreation, health care, infostructure upgrades • Small sidewalks • Jobs, housing, day cares • Informing our citizens of changes in the community as well as opportunities. Involve our community in the decision-making processes by encouraging reception of opinions and views. Refer to social media questions. • Recreation for kids can improve like a bmx track or fix up skate park, both of which a relatively inexpensive, and can be good social places for our youth. • Support for local activities (concerts in park,etc) • Fixing our infrastructure • Improving housing • Garbage and recycling • Tree planting → green space • More focus on sewage system & street repairs • Cleaner streets & yards • Fire & Rescue, garbage p.u. street cleaning, snow removal, admin office • Infrastructure planning, repairs, economic dev,

<p>ADMINISTRATION VIEWS</p> <ul style="list-style-type: none"> • What are we doing well? • What could we be doing better? • How well are we satisfying stakeholder needs? • How well are we satisfying employee needs? • How might we build a stronger internal organization? • Do you feel like you have enough support and access to resources/training? • Other? 	<ul style="list-style-type: none"> • More green spaces, cleaner parks, • Training should always be encouraged • Team building exercises/events can lead to better work outcomes • We work well with outside organizations by working together • Provide more programming for public – build better partnerships with existing organizations that provide services to the community, so programs and services are not duplicated. • Difficult to get needed employees. Trying to build a great team and sometimes there just is not the pool of employees available. • Trying to provide a great working environment for employees. The sliding scale wage chart has helped to reward those employees that are excelling in their positions. Staff fund tries to develop relationships with employees outside of the day-to-day work schedules. • Training is a continuous requirement and often difficult to keep on top of what is required. • Services & opportunities, communications, beautification • Very well (how well are we satisfying stakeholder needs) • Well (how well are we satisfying employees needs) • Yes (do you feel like you have enough support and access to resources/training?) • As a newly elected Councillor I am still in a steep learning curve. Right now I do not fully understand the hierarchy or applications of the Administrative area of Council • New councillors should be introduced by way of an introduction process incorporating 'ride along' programs with members of the non-elected executive • Know our staff/knowledgeable • Quick responses • Approachable • Better communication (what could be doing better) • Decent (how well satisfying stakeholder) • Good (employee needs) • Yes (do you feel enough support and access to resources/training) • We have enough support and access for training...just the dollar and time amount that is lacking...what is reasonable for an employee to attend in one year and how do we fit it into the budget. Feel we are doing well with what we have.
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	<ul style="list-style-type: none">• Doing great as an organization – trying to keep communication flowing with all employees.• Feel we almost act too quickly in some cases as they then expect that response all the time...example snow removal. If we are really quick at opening town, it is then expected to be the new norm. Often means more equipment and men to complete the work for the general public.• Leaders are experienced, educated, Safety comm is doing well.• Communication, training, use the resources available.
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FISHMOO Analysis

We are providing you with a framework to conduct a systematic review of your organization’s Strengths and Weaknesses. You do not need to include comments in each section, however as with the PESTLE, this is a mnemonic tool to help you structure your thinking.

FISHMOO	STRENGTHS	WEAKNESSES
FINANCE	<ul style="list-style-type: none"> • Wealthier community – strong agricultural area so able to afford services. • Generous area and always up to donate to a worthy project • Knowledgeable staff • Experience • Work well with what we have • Auditor • Growing tax base • Budgets have been increased for projects and council has been moving forward with upgrading infrastructure • Balanced budgets, focused on the right things 	<ul style="list-style-type: none"> • Depending on tax base is pushing the taxes up. • Need to find new revenue strains and growth in residential and commercial • Resident to increase taxes • Debt • Need for more tax dollars • Lack of funds • Not keeping up with growth • High taxation levels on residents and commercial properties
IT/TECHNOLOGY	<ul style="list-style-type: none"> • Up to date systems • In a good spot with Social media and website • Public is getting informed through the website, etc. Also uses the website to register for social programs. • Program & equipment update • New opportunities once new internet is installed • 3rd party provider • Moving ahead • Mapping project started • Good use of a variety of platforms 	<ul style="list-style-type: none"> • Being fixed currently but access to high speed internet • Carman Chat • Still not completely sold on our website...still feel it could be better user-friendly as sometimes struggle to find information on it – but it has improved. • Training & time to use to potential • Not enough tech business • Our knowledge ? Maybe • Not for everybody • Weakness on public works department – need to GPS everything for reference. Mapping was started; however needs to be expanded.

		<ul style="list-style-type: none"> • Reliance on outside service providers, timely delivery
STRATEGY	<ul style="list-style-type: none"> • Economic Development has had strategy that it follows for years • Made improvements with branding and need to build from there • Great joint cooperation moving forward with the RM of Dufferin • Our current executive • Being developed • Council open to new process and planning 	<ul style="list-style-type: none"> • Where should the town be heading? Do we wish to be a bedroom community or do we wish to strive for commercial and business? • Really don't have a direction – earlier councils felt a bedroom community was all that was needed – now not so sure that is enough • Differing opinions on priorities • No clear path • Absent • Limited to budget process
HUMAN RESOURCES	<ul style="list-style-type: none"> • Good cross section of employees and the age of employees that should allow sustainability • Current employees do complete the job at hand. We do have the resource of a retired employee that returns for the summer and is a leader within the public works department. • Experienced key staff 	<ul style="list-style-type: none"> • No dedicated HR function • Seems that staffing is always short and pushed to its limit • Often there are no qualified employees to hire • Training • Not enough workforce • Often hard to find suitable employees in the community. We often advertise and the hire from outside. • Succession planning to replace
SALES AND MARKETING	<ul style="list-style-type: none"> • Good Marketing Strategy • Great and beautiful community to sell to the public • Been presented at many trade shows • EDO well respected • We have the people • Location ... • Solid brand, & "Tyler" 	<ul style="list-style-type: none"> • Need to push for people to relocate and open business in our community • Need to be open for business • Population & closeness to Winnipeg • Lack of mojo and direction • Shopping • Demand on Tylers time with limited resources

OPERATIONS	<ul style="list-style-type: none"> • Great service provided to ratepayers • Services are always revamped and improved • Quick responses • Provide great service to ratepayers – street sweeping, snow removal. Employees very flexible to do these tasks during the evening and nights. • Great service, flexible staffing between depts • Open to improving operations by council and CAO 	<ul style="list-style-type: none"> • Community gets spoiled and is always seeking a “new norm” or even better services...hard to keep on top of demands. • Procedures • Can’t get jobs done fast enough for the public. • Staff turnover, proactive planning and lack of budget to repair streets, sewer and water.
OTHER	<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> • FIPPA • Community growth is slower than other communities in Pembina Valley.

SWOT

A scan of the internal and external environment is an important part of the strategic planning process. Environmental factors internal to the organization usually can be classified as strengths (S) or weaknesses (W), and those external to the organization can be classified as opportunities (O) or threats (T). Such an analysis of the strategic environment is referred to as a SWOT analysis.

Strengths and Weaknesses (Internal Capability Assessment)

The purpose of the internal assessment is to determine what the organization can do.

Strengths

An organization's strengths are its resources and capabilities that enable them to be successful in delivering products and services:

- Service excellence
- Good reputation among stakeholders
- Efficient operations and processes
- Collaboration between departments.

When you write the Strength, it should have the attribute plus an impact. For example:

- Our company responds quickly to questions received by their clients.

Document Strengths here:

- We respond quickly to questions from citizens and visitors
- Communication between departments works well
- Operations have been streamlined to assist with better coordination and sharing
- Administration/Council coordination is efficient
- Try to provide impeccable service to ratepayer through every service provided
- Building a team so all department provide this great service
- Working closely with the RM of Dufferin to provide these services not only to the Town of Carman; but also the RM of Dufferin residents.
- Front line CSR & admin all respond to rate payers in a timely fashion
- Excellent service – garbage pick up, snow removal, water breaks all answered in a timely fashion
- Our departments work well together – rec, public work, water plant, all work well towards a goal
- Wisdom...age, knowledge, experience /location/cost of living/services
- ToFC enjoys excellent Carman/Dufferin collaboration. The majority of the community trusts the executive and enjoy a good relationship with staff at all levels
- Established community with pride, contentment and loyalty. 'word of mouth is strong' with proud family histories being a foundation of the ethics within our community.
- People, staff

- Equipment
- To provide good service with no to little down time
- Improving infrastructure as residents request
- Prompt service through garbage, recycling, compost
- These services are done efficiently and picked on time. Programs expanded as public requests.
- Strong service delivery by public works, recreation, office as shown by consistent and timely delivery. IE street clearing, garbage and recycle p.u, recreation sign ups,
- Recreation dept, planning, economic dev all seem to be doing well. Staff are organized, services are utilized.
- Financials are in good order. Audits come back clean. Budgets are met every year. Revenues are collected in good order, including grants and taxes.
- Tourism and marketing is handled well by Staff. Examples of our presence is evident in social media feedback, website hits, use of tourism booth, trades shows, etc.
- Town council is generally accepted as competent and has the best interests of the community in mind when making decisions. Proactive decisions have been made. Recent examples are the personal care home, fire and rescue equipment, water reservoir, high speed internet.
- New water reservoir (portable water)
- Strong community groups GPAC pathway museum – heritage das
- Giving community through donations – PCH library ball diamonds
- Great facilities (recreation) – kingspark BBQ, trees, golf course, curling, hockey, soccer, ball, pool, splashpad, pathway
- Will have 2 fibre internet providers
- Update of PCH (expansion)
- 2 medical clinics
- Updated, staffed & modern fire dept
- Garbage, recycling
- Snow clearing – quick & driveway service
- Elementary & high school
- 2 day cares
- Equipment rotated & maintained eg. Trucks, mowers, garden loaders
- 3 care dealerships, 2 autoparts stores, 2 tire shops
- Strong ag sectors – ag, chemical, research

Weaknesses

The absence of certain strengths may be viewed as a weakness. For example, each of the following may be considered weaknesses:

- High cost structure
- No long term approach to resource planning

When you write the Weakness, it should have the attribute plus an impact. For example:

- Communication between departments is irregular leading to misinformation being shared and inefficient processes.

Document Weaknesses here:

- Lack of long term planning of operations leads to short term focus on projects
- Always seems that no matter how well you complete a job, it could always be better.
- Each project has people on each side of the fence and sometimes this creates a toxic environment for the municipality and the public
- Communication (because of legally unable to talk about a subject) prohibits all facts being shared with the general public.
- Succession planning – short of trained, skill replacements – we are improving
- Utilization of labour – do we explore new procedures?
- Communication – shortfall of communication between council + Robbie Although there is a perception of all-in teamwork by the community it has been shown through recent land issue that it was a for and against situation. The town was seen as “bullies” by many and lack of communication created a local hysteria which was envisioned as being the status quo.
- Communication is the key to success.
- YUP (→ communication between departments is irregular leading to misinformation being shared and inefficient processes)
- Lack of communication with rate payers caused by indifferences
- The public does not help us in certain cases – general public overloading compost so employees cannot pick up the material
- Taxes have increased greatly over the last 10 years, mostly due to fixing and replacing aging infrastructure. Future taxes will be used to pay for personal care home, water, on top of infrastructure.
- Annual growth of community not enough to keep up to costs.
- Expensive infrastructure replacement (aging infrastructure)
- Only one grocery store
- Succession planning – re: bucksaw, knockabouts
- Affordable housing
- Lack of water for wet industry
- Daycares full (Waiting lists)

Opportunities and Threats (External Environment Assessment)

The purpose of this section is to assess the opportunities and threats that may be present in the environment that could have an impact on future strategies. To complete the external assessment, there should be a systematic review of key aspects of the relevant environment which may include:

- Social
- Technological
- Economic
- Political factors
- Market characteristics (size, trends, segmentation, position in product life cycle, and buyer/consumer preferences and behavior)
- Industry structure

- Competition (indirect and potential of new entrants)
- Apparent key success factors

The work completed in the PESTLE exercise will help you complete this exercise.

Opportunities

The external environment analysis may reveal new opportunities for efficiencies and change. An example of an opportunity is:

- Increasing partnerships with the private sector.

When you write the Opportunity, it should have the attribute and the impact. For example:

- Increasing partnerships with the private sector to stimulate the local economy.

Document Opportunities here:

- Increasing partnerships with regional partners to grow the region
- Increasing partnerships strategically with local partners to create efficiency and growth
- This planning process will aid the municipality in developing priorities for future project; growth strategies and implementation through the administration.
- Perpetual planning will be able to be realized and thus not changed every four years with a new municipal council.
- Vision will be provided where the community would like to move forward to.
- Improve communication to diffuse anguish over misled assumption
- A properly implemented Strategic Plan (planning) will allow the development of short term, medium term, long term and boundless perpetual planning. The existing team has the knowledge, enthusiasm and leadership qualities to leave a legacy unchallenged by previous Councils.
- YUP (→Increasing partnerships with the private sector to stimulate the local economy.)
- Increasing partnerships with users to achieve capital improvements
- Continued investment in growth opportunities to build on existing and upcoming projects. Momentum may help create more projects.
- High speed internet may attract and create growth in businesses, residents.
- Population growth will be natural with the improved services and opportunities created. This will help mitigate municipal costs.
- With community growth there's an opportunity for staff training and internal promotions.
- Community attracting a lot of older people retiring to area
- Funding sources eg., prov & federal govt. only providing percentage on high ticket projects. Funding sources slow. Have to lobby govt then have engineered shovel ready project ready to go
- Affordable housing
- Employment (jobs)

Threats

Changes in the external environment also may present threats to the organization. An example of a threat:

- Investment in urban/rural communities will continue to evolve.

When you write the Threat it should have an attribute plus an impact. For example:

- Investment in urban/rural communities will continue to evolve, our local government needs to keep a pulse on provincial obligations versus municipal.

Document Threats here:

- Lack of investment in the community by private developers leading to lack of growth
- Offloading of responsibilities from other levels of government creating strain on local councils to be able to follow their strategic plan
- Ever changing rules and laws forced down on municipalities always cause issues with the operation of the municipality plus the dollars available to complete work.
- Members of Council that are “on a mission” and only at the table for their personal gain.
- Lack of discipline to move forward with the action plan once in place. Need buy in from Administration and Council to keep moving forward in the right direction.
- Losing traction by not keeping pace with the fast changing demographics of neighbouring communities.
- Developing documented and reviewable processes for the future growth and not being able to accept responsibility/accountability for issues which may arise i.e. non-conformity, inaction, reticence. Losing vision of the star of end result.
- Increase traffic during peak hours (noon) almost make it impossible to travel on hwy 21
- Less rural representation will cause decline in provincial & federal financial assistance
- Water supply comes from a limited source with multiple holders to rights. Supply will need to be balanced against residential growth and business opportunities.
- Government policies may dictate expensive changes to budgets, forced mergers, less funding in grants and for libraries,
- With growth comes a need for multiple housing dwellings with planned infrastructure and a need to be efficient in use of funds. We also need more people than we have in town to work in new ventures and with that we need investment in housing and in service providers, both retail and commercial.
- Generally speaking most kids when done school move away due to lack of employment
- Social media (misinformation)
- Nurses moving (opportunities in other markets)

Appendix D: Project Plan Template

Should Company wish to delegate the completion of strategic projects to others, this is a tool that can be used to help develop the actions to be completed.

If a project involved two or more people and takes more than 10 hours to complete, it is recommended to prepare a project plan.

Strategy	(Insert the strategy title).				
Objectives	(List each objective this strategy will help to accomplish).				
Leader	(Identify the strategy leader).				
Deliverables	(Identify the key deliverables for this strategy)				
Timeline	Start/End	Effort	Estimate hours.	Costs	Estimated Costs

	Task	Who	End Date	Effort	Cost
1.					
2.					
3.					
4.					
5.					
6.					

Appendix E - Accountability and Rewards

As our leadership team and staffing complement grows, it is important to share strategic responsibilities. When doing so, it is important for team members to understand what they have accepted to do and what is involved.

Five critical components to accountability to the planning process are described below.

Clear identification and articulation of the work to be done.	<ul style="list-style-type: none"> • This is often where the breakdown of accountability starts. • Work needs to be clearly defined, or expectations and timelines need to be clearly articulated. • The plan must be written out and shared with appropriate participants.
Accepted responsibility	<ul style="list-style-type: none"> • When the work is defined, someone has to accept responsibility for getting it done. • Please note that assigned responsibility does not equal accepted responsibility. • Make sure the person who has been assigned the responsibility, has accepted it.
Monitoring and reporting.	<ul style="list-style-type: none"> • Accountability is from the Latin word that literally means to give an account. • We may have accepted the responsibility for clearly defined work. However, without a monitoring and reporting process, (i.e. without a process for people to give an account), there's essentially no accountability.
Reward for accomplishment.	<ul style="list-style-type: none"> • A key to effective accountability is to have a reward for accomplishing the item for which we're being held accountable. In the workplace, rewards can take a variety of forms, including recognition, time off, gift certificates, convenient parking spaces, etc.
Consequences for lack of performance.	<ul style="list-style-type: none"> • Consequences are necessary to ensure that there is both a carrot for performance. • While many organizations avoid the stick, experience has been that consequences are an essential component for letting people know they've let the team down. An example of a consequence may be as simple as having a team member point out that you did not complete a task as requested.

Source: *The Executive Guide to Facilitating Strategy*, Michael Wilkinson

Appendix F - Meeting Types and Frequency

The following table summarizes the types of meetings that are suggested when implementing a strategic plan.

	Participants	Duration	Location	Timing	Primary Activity
Strategic Plan Renewal	Owners/Leadership Team	2 days	Offsite	Every three years or as required	To set the long-term Vision and Strategic Goals
Annual Review	Management Team	1 day	Offsite	Minimum 6 weeks before new year.	Review previous year, plan for next year
Quarterly Review	Management Team	1/2 day	On or Offsite	3 weeks before next quarter	Review previous quarter, plan for next quarter
Monthly Review	Management Team	Up to 2 hours	Onsite	1 st of the month	Review activities completed for the month and plan for following month.
Strategy Review	Strategy Team	Up to 1 hr	Onsite	Weekly or as required	Review activities completed for the week and plan for following week.
Daily Review	Business Unit Team	10 min As required only	Onsite – standing meeting	Morning	Planning the day.

Appendix G - Glossary

Barrier – is something that is preventing you from reaching your goal and you will have to find a way around it. Identify no more than 5 – 7 barriers.

Baseline – is your current measure. If you do not have a current baseline, you can use an industry benchmark if available.

Budget/Actual - is what you would like to achieve and what you did achieve.

Critical Success Factor (CSF) – is something you need to put into place to achieve your goal. Identify 5 – 7 CSFs.

Measure – is how you will go about measuring the objective. Describe the measure you will use to evaluate each objective.

Mission - Describes our reason to exist. It should answer, what do we do, for whom and why (benefit).

Objective – is SMART (specific, measurable, achievable, realistic, time-bound). Identify 5 – 7 objectives.

Positioning Statement – are general guidelines which set the foundation for how the organization will operate. How the organization plans to win: the direction and focus for the organization.

Strategic Priority - a broad aim that if successfully implemented, will lead to the achievement of the vision. Identify up to 3 – 5 strategic priorities.

Projects - are identified by looking at what needs to get done. The Critical Success Factors and Barriers and the Objectives that are being.

Values – Describe the culture of the business.

Vision - Describe your future state. It should inspire, provide direction and alignment and clarity to the organization's direction.