



# Township of Wilmot

## Setting Priorities & Achieving Results: Strategic Action Plan

### Draft Final Report (REVISED)

October 15, 2024

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## 1.0 Introduction

- 1.1 Context & Objectives
- 1.2 Collaborative Approach
- 1.3 What We Heard: Highlights

### Context

- ❑ Within the Region of Waterloo, the Township of Wilmot is a growing community with a population of approximately 22,000 expected to grow to 28,500 by the year 2031.
- ❑ Most residents live in the towns of New Hamburg and Baden and the smaller communities of St. Agatha, Petersburg, Mannheim, New Dundee, Philipsburg, Shingletown, Wilmot Centre, Haysville, Luxemburg, Lisbon, Sunfish Lake and Foxboro Green.
- ❑ Providing residents with a full range of programs and services, the Township is governed by a Mayor and five Members of Council.



### Project Objectives

- ❑ In the lifecycle of every organization, there comes a time when you need to discover – or rediscover – your core purpose and strategic goals. In the case of municipal government, this opportunity comes every four years following the election.
- ❑ Establishing an action-oriented and results-focused Strategic Plan is necessary to help Council work with the management
- ❑ An effective Strategic Plan needs to achieve these outcomes:
  - Incorporate input from the community, Council, and staff;
  - Clearly articulate overarching goals and priorities;
  - Establish a “roadmap for action” providing direction for budgets, projects, and operations; and
  - Accomplish buy-in and shared vision among Members of Council and the management team.

### Approach Highlights

- ❑ The Strategic Action Plan is Council's direction to the administration. It is important that staff and residents have an opportunity to be involved in this process.
- ❑ Phase 2: Leadership & Community Engagement was focused on collecting and summarizing input from:
  - Leadership Team (Members of Council & Corporate Leadership Team) one-on-one interviews.
  - Community questionnaire – 626 responses.
  - Staff questionnaire – 61 responses.
  - Session 1 (June 18) with the Leadership Team (Members of Council & Corporate Leadership Team).
  - Session 2 (Aug 12): Leadership Team (Members of Council & Corporate Leadership Team).
  - Community Focus Group Sessions (Sept 19) – two sessions.



### Community Questionnaire Highlights

- ❑ An online questionnaire was created to capture valuable input from residents on municipal services and future priorities. The link to this questionnaire was shared on the website and social media pages.
- ❑ The questionnaire was live between June 24 – July 24, and 626 residents participated.
- ❑ Detailed results are included in the Appendix, however some of the highlights include:
  - To the question “What makes Wilmot a great place to live?”, over 80% selected “Small town feel & friendly people” as either their first, second or third preferred choice followed by 58% who selected “Outdoor open space, parks and trails” as either their first, second or third preferred choice.
  - The most important “Local government services to your household” was “Fire & emergency services” followed by “Maintenance of local roads”.

## Township of Wilmot launches engagement for 2024 to 2027 Strategic Plan

Posted Monday, June 24, 2024



WILMOT, ONT.— The Township of Wilmot is launching the development of a new Strategic Plan that will serve the community and provide Wilmot Council with tools for decision-making from 2024 to 2027.

The Township is seeking community input into Strategic Plan, giving stakeholders an opportunity to help the shape future programs, services and Township planning. Wilmot has hired Linton Consulting to work with the Wilmot Corporate Leadership Team, Township Council and...

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### Community Input Sessions

- ❑ Two community input sessions were held September 19. One between 12:00-2:00 at the Wilmot Recreation Complex and the other at the St. Agatha Community Centre 7:00-8:30. 14 participants attended the first session, and 17 attended the second session.
- ❑ Following a brief introduction describing the project objectives, approach and status, participants were given an opportunity to provide their thoughts and ideas on the actions that should be taken by the Township in each of the four goal areas: financial stability, healthy community, prosperous businesses & balanced growth, and trustworthy leadership.
- ❑ Common themes/concerns that emerged from these sessions focused on themes of financial stability, improved transparency and rebuilding trust:
  - Transparency of the state of Township’s finances. Residents expressed feelings that to rebuild trust, finance staff should provide context and explanation of the current state of finances.
  - Communication needs to improve. Ideas included using the local newspapers more and improving the current email subscription service.
  - Other themes mentioned included the land assembly process, housing affordability, new development standards, aging population concerns, infrastructure renewal, aggregate extraction, more town hall-style meetings, improving the website, and Township staffing issues.



### Staff Questionnaire Highlights

- ❑ An online questionnaire was created to capture input from employees. The link to this questionnaire was emailed to all staff with 61 employees participating.
- ❑ Detailed results are included in the Appendix, however some of the highlights include:
  - The top response to the question “Rank the following challenges that you think require attention during this Council term” was “Improve the Township’s finances” followed by “Cost of living / housing affordability”.
  - The top response to the question “How effectively does the Township manage its employees?” was “good” at 36% while 30% selected “quite good”.
  - When asked the question on what methods of communication are preferred by citizens, the top two responses from staff were “Township website” and “Township social media”.





## 2.0 Strategic Action Plan

- 2.1 Introduction
- 2.2 Goals
- 2.3 Strategic Priorities & Actions
- 2.4 Core Values

### Leadership Team (Council & Senior Management Team) Direction

- ❑ During the 1:1 interviews with Members of Council and the Corporate Leadership Team, we asked for the key project success factors. There was widespread agreement that the Strategic Action Plan needed to accomplish the following outcomes:
  - **Build a shared vision** and achieve common ground among Members of Council.
  - **Community input** to validate that we are on the right track.
  - **Clear and simple language** that would be understood by all readers.
  - **Action-oriented** to enable the effective tracking of progress.
  - **Achievable** by ensuring that we are not making promises or setting expectations that are outside our sphere of authority.



➤ **Goal 1: Financial Stability**

- Build a strong financial foundation to support our community now and in the future.

➤ **Goal 2: Healthy Community**

- Provide core services and build strong community partnerships.

➤ **Goal 3: Prosperous Businesses & Balanced Growth**

- Facilitate responsible growth providing opportunities to live and work in Wilmot.

➤ **Goal 4: Trustworthy Leadership**

- Foster a positive and respectful working environment engaging and serving our community.



### Goal 1: Financial Stability

#### **1.1 Taking a long-term evidence-based approach to drive budgeting, operations and projects.**

- a) Implement an enterprise resource planning (ERP) system as a foundation for effective financial accountability and reporting.
- b) Enhance and expand the Asset Management Plan in compliance with provincial requirements.
- c) Complete a financial reserve plan, including a Council-approved reserve policy.
- d) Establish a multi-year operating and capital budget forecast that includes estimated growth-related costs.

#### **1.2: Diversifying our revenue sources to reduce reliance on residential taxpayers.**

- a) Build organizational capacity to pursue and apply for financial grant opportunities.
- b) Explore opportunities to introduce user fees where appropriate.
- c) Introduce Council-approved revenue generation (pricing policy) and cost-recovery targets in specific program/service areas.
- d) Introduce a naming rights/corporate sponsorship program/policy.

# Goal 2: Healthy Community

## 2.1 Delivering valuable core services and programs.

- a) Establish service level standards and targets for core Township-delivered services and programs.
- b) Develop and share a “who does what” communication piece describing Township, Region, and Provincial areas of responsibility, including communicating the Township’s service level standards and targets.

## 2.2 Expanding healthy living and recreation opportunities.

- a) Establish a skate park concept design, location, funding options, and potential community partners.
- b) Complete accessibility plan with clear priorities, timelines, and estimated costs.
- c) Establish timelines and viable funding options to move forward with enhanced recreation amenities in alignment to the Community Services Master Plan.
- d) Create a plan and potential funding options to rehabilitate the New Hamburg arena.

## 2.3 Working with our community partners to enhance our quality of life.

- a) Engage local school boards to expand use of school facilities and amenities for community programs.
- b) Strengthen relationships with community groups by developing partnership agreements that include clear and consistent policies, processes, roles, and responsibilities.
- c) Work with the Region of Waterloo to enhance public transit options for Wilmot residents.

# Goal 3: Prosperous Businesses & Balanced Growth

## **3.1 Encouraging well-planned growth while preserving our rural heritage and small-town character.**

- a) Complete a secondary plan for Baden and New Hamburg identifying areas where higher density housing is appropriate.
- b) Develop a financial strategy to support sustainable growth.

## **3.2 Support local businesses and provide more housing options.**

- a) Introduce Community Improvement Plan (CIP) with incentives to revitalize core urban centres and encourage more affordable housing in appropriate locations.
- b) Attract jobs and investment by introducing an economic development officer position.
- c) Complete an economic development strategy recommending actions to support existing businesses and attract new investment and jobs.
- d) Expand the partnership with the Waterloo Regional Tourism Marketing Corporation to include additional Wilmot amenities and activities.
- e) Establish a dedicated reserve fund to support the development of future affordable housing options.

## **3.3 Protecting our natural environment.**

- a) Partner with community groups to implement a “Let’s Tree Wilmot” program increasing the urban tree canopy.
- b) Establish a plan with funding and sponsorship options to expand and enhance the Township’s trail network.
- c) Explore options and costs to introduce a meaningful green energy pilot project.

### Goal 4: Trustworthy Leadership

#### **4.1 Enhancing the Township's reputation through meaningful community engagement.**

- a) Initiate bi-annual Town Hall sessions with the Mayor, Council and Township staff.
- b) Complete a communication strategy that establishes community engagement priorities/targets, activities, and methods, including optimizing the Engage Wilmot portal site.
- c) Create clear and concise communication raising awareness of the Township's significant financial challenges, including information about what actions are being taken to address this issue.
- d) Initiate a web-based performance dashboard communicating progress on strategic priorities and actions.

#### **4.2 Continuously improving our day-to-day operations to be more effective, efficient, and customer focussed.**

- a) Complete a comprehensive service review to establish a baseline of program/services costs. This review will include community engagement, and the outcome will be recommended service levels including costs and budget implications.
- b) Explore opportunities for sharing services with neighbouring municipalities.
- c) Implement customer service/request tracking processes and tools (e.g, Customer Relationship Management (CRM) software) to enhance customer service across all programs and facilities.
- d) Complete a space needs review and develop options to accommodate future growth.

#### **4.3 Fostering a culture of excellence and professionalism.**

- a) Update and improve the Council-staff relations policy and code of conduct.
- b) Establish customer service standards for staff in all departments and in all facilities.
- c) Initiate mentoring/succession planning policy and procedures.
- d) Introduce enhanced professional development and training opportunities across all departments.

### **WORK TOGETHER**

We know the best solutions come from effective communication and genuine teamwork. We will demonstrate trust in each other by embracing our differences in the spirit of finding the best answers and making great decisions for our community. We will demonstrate we have each other's back and will respect team decisions.

### **OPEN & TRANSPARENT**

We are committed to having open and honest discussions because we recognize none of us has all the answers. We will strive to make decisions and take actions that are in the best interests of our community. We value integrity, equity, compassion, and transparency and will ensure that our actions reflect these values.

### **RESPECTFUL**

Even when we do not agree with each other, we are committed to demonstrate that we value each other's opinions, perspectives, and areas of expertise and authority. We will not rush the decision-making process, and we will strive to provide a safe, judgement-free environment to share opinions and perspectives. We will come prepared to meetings because we value each other's time and effort.

### **INFORMED DECISIONS**

It is important that our discussions start with the facts because we know that good information enables good decision-making. Healthy, forward-thinking discussions build common ground and contribute to evidence-based decision-making.

### **COURAGEOUS**

We are committed to working together to do the right things in the right ways – even when these decisions are difficult or unpopular. We do this because we are committed to advancing the long-term best interests of our community. We also recognize the importance of communicating the rationale behind our decisions and actions.

### **RESILIENT**

We recognize that we will face difficult times, and we are committed to working together to build a strong team that can persevere through hard times; adapt to change; and remain steadfast in achieving long-term positive results for our community.



## 3.0 Next Steps

- 3.1 Towards the Final Product
- 3.2 Tracking Progress

### Final Strategic Action Plan Deliverable

- ❑ Once Council has approved the content of the Strategic Action Plan, Linton Consulting will work with our in-house designers to develop a final Strategic Action Plan designed to be read by the entire community.
- ❑ This Plan will include word-for-word content approved by Council.
- ❑ This final document is expected to be completed within three weeks of Council approval of Strategic Action Plan content.

### Samples of Recent Linton Deliverables



### Strategic Action Plan Progress Tracker

- ❑ Establishing goals, priorities and actions is important. Being able to monitor and track progress is equally as important. A Strategic Action Plan Progress Tracker (sample page below) has been created to assist management to demonstrate progress to Council and the community on a regular basis. Target dates, lead department, percentage complete, and relevant comments provide a simple tool for ongoing monitoring and tracking for every action included in the Strategic Action Plan.

# GOAL 1: Financial Stability



## 1.1 Taking a long-term evidence-based approach to drive budgeting, operations and projects.

ACTIONS	TARGET DATE	LEAD	% COMPLETE	COMMENTS
a) Implement an enterprise resource planning (ERP) system as a foundation for effective financial accountability and reporting.	2025/Q2	TBC	0%	
b) Enhance and expand the Asset Management Plan in compliance with provincial requirements.	2025/Q3	TBC	0%	
c) Complete a financial reserve plan, including a Council-approved reserve policy.	2025/Q4	TBC	0%	
d) Establish a multi-year operating and capital budget forecast that includes estimated growth-related costs	2026/Q2	TBC	0%	

no progress

in progress

complete

## Appendix: Questionnaire Results

- Community Questionnaire
- Staff Questionnaire

## Introduction

- ❑ An online questionnaire was created to capture basic input/feedback from residents on services and future priorities. The link to this questionnaire was shared on the home page on the website and promoted through social media.
- ❑ The questionnaire was publicly available between June 24 – July 24 and 626 residents participated.

# Township of Wilmot launches engagement for 2024 to 2027 Strategic Plan

Posted Monday, June 24, 2024

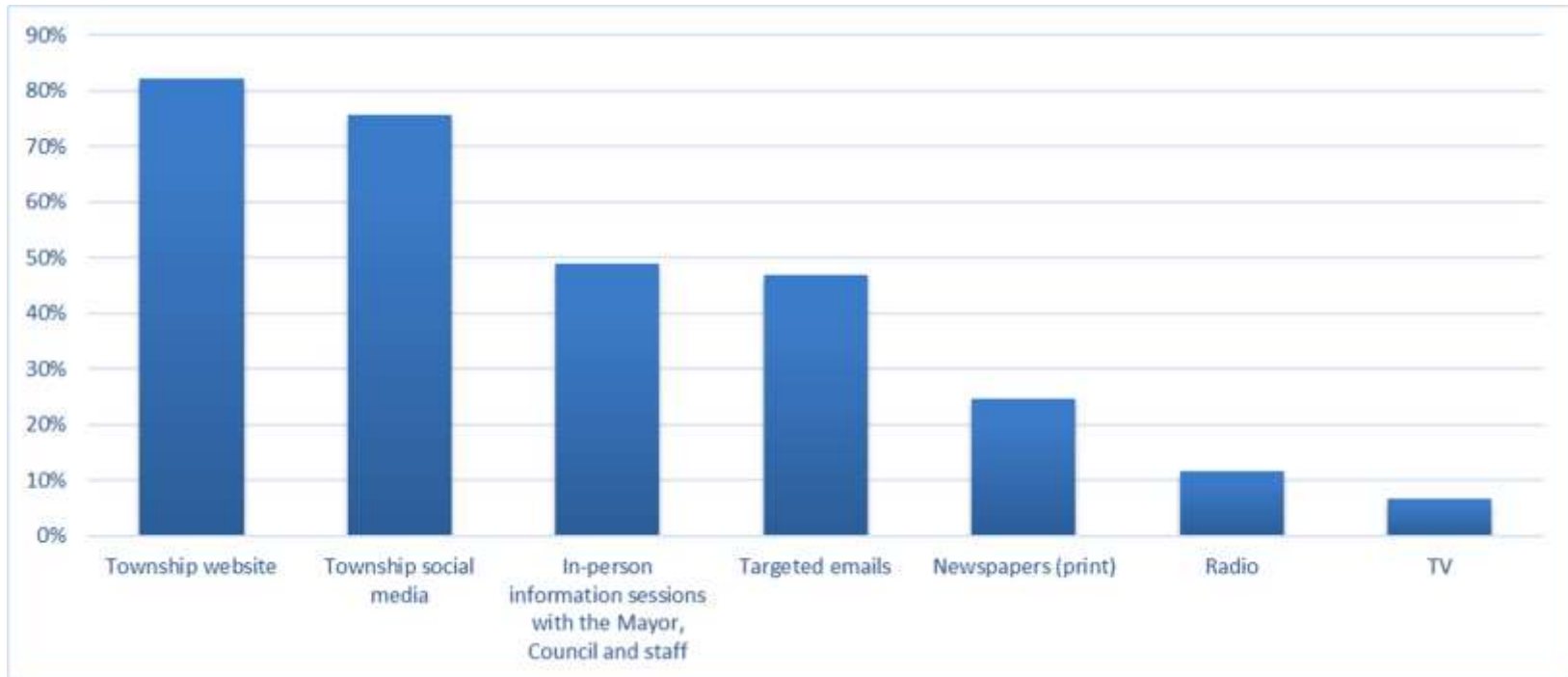


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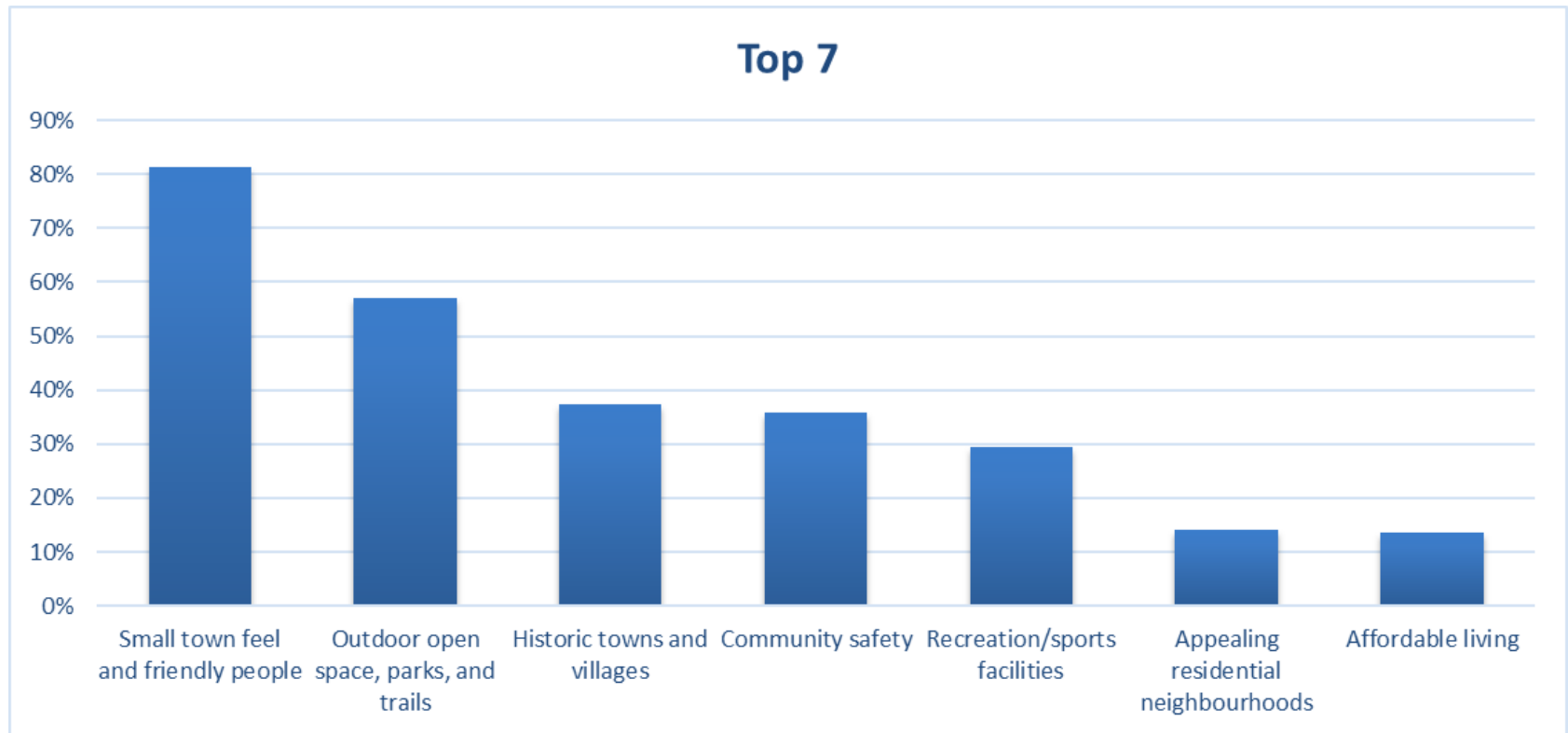
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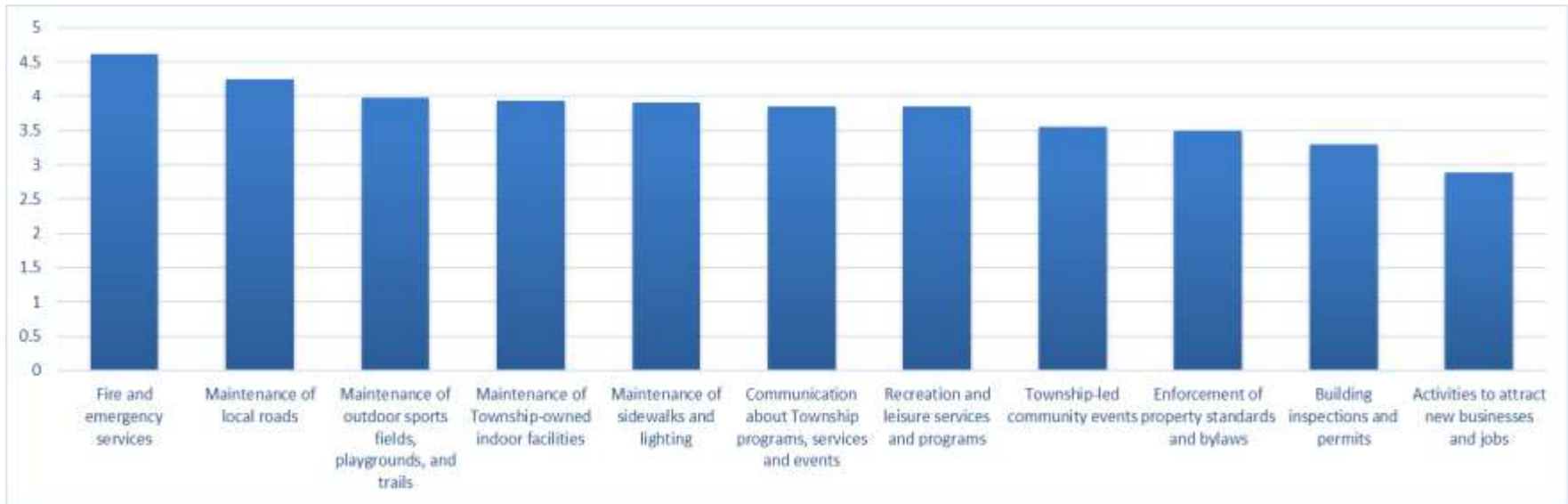
**Question:** Rank the below communication methods based on how you would prefer to learn about Township issues/events/initiatives. The below graph shows the top three choices from participants – 82% selected “Township website” as either their first, second or third preferred choice and 76% selected “Township social media” as either their first, second or third preferred choice.



**Question:** Rank the below features that you think make Wilmot a great place to live? The below graph shows the top choices from participants – 81% selected “Small town feel & friendly people” as either their first, second or third preferred choice followed by 57% who selected “Outdoor open space, parks and trails” as either their first, second or third preferred choice.

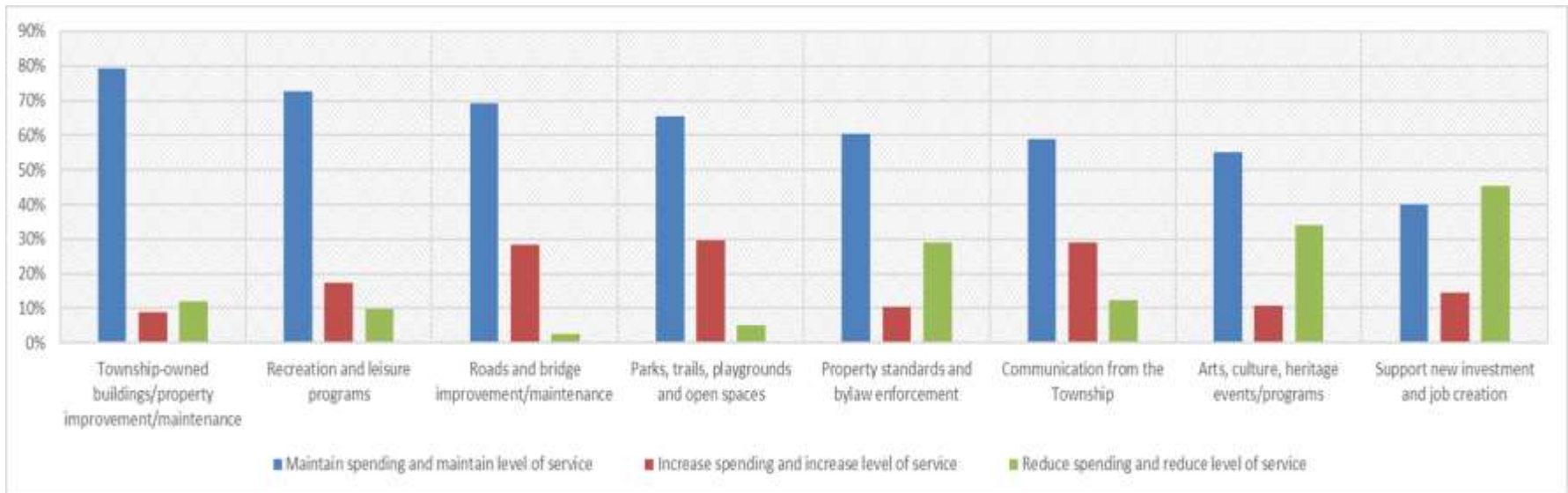


**Question:** How important are the following local government services to your household (with 1 being “not important at all” and 5 being “extremely important”)? The below graph shows the most important service of respondents was “Fire and emergency services” with an average score of 4.62 out of 5. “Maintenance of local roads” was next at an average score of 4.25 out of 5.

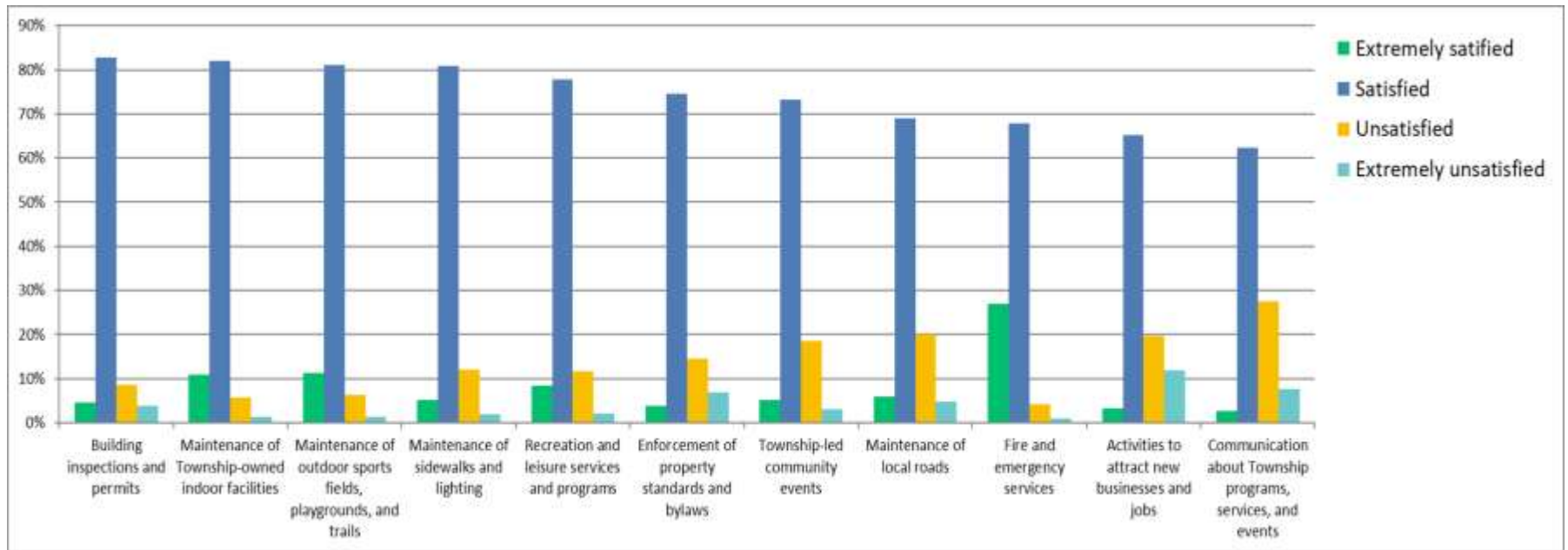




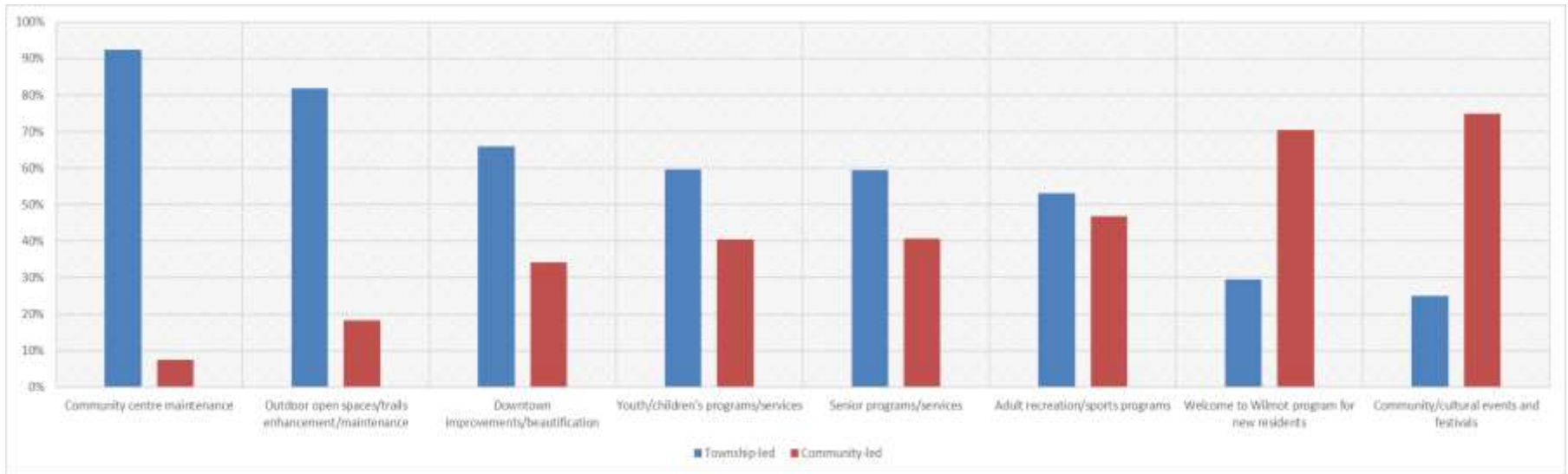
**Question:** Considering that Wilmot Township receives only 29¢ of every dollar of property tax paid by a resident, for each of the following services, identify what you would like to see happen? The graph below indicates a preference among respondents to “maintain spending and maintain level of service” in all areas except for “Support new investment and job creation”. In this area, 45% would prefer that the Township “Reduce spending and reduce level of service”.



**Question:** How satisfied are you by the following services provided by the Township of Wilmot? The graph below demonstrates widespread satisfaction with the services. Approximately 35% are either unsatisfied or extremely unsatisfied with “Communication about Township programs, services and events. This suggests that external communications and community engagement could be improved.



**Question:** For the activities listed below, indicate whether you think the Township (using Township staff and tax dollars) or community groups (using volunteers and donations) should lead this effort. The graph below indicates that respondents would prefer to see community groups taking the lead on both “Welcome to Wilmot program for new residents” and “Cultural/community events and festivals”.

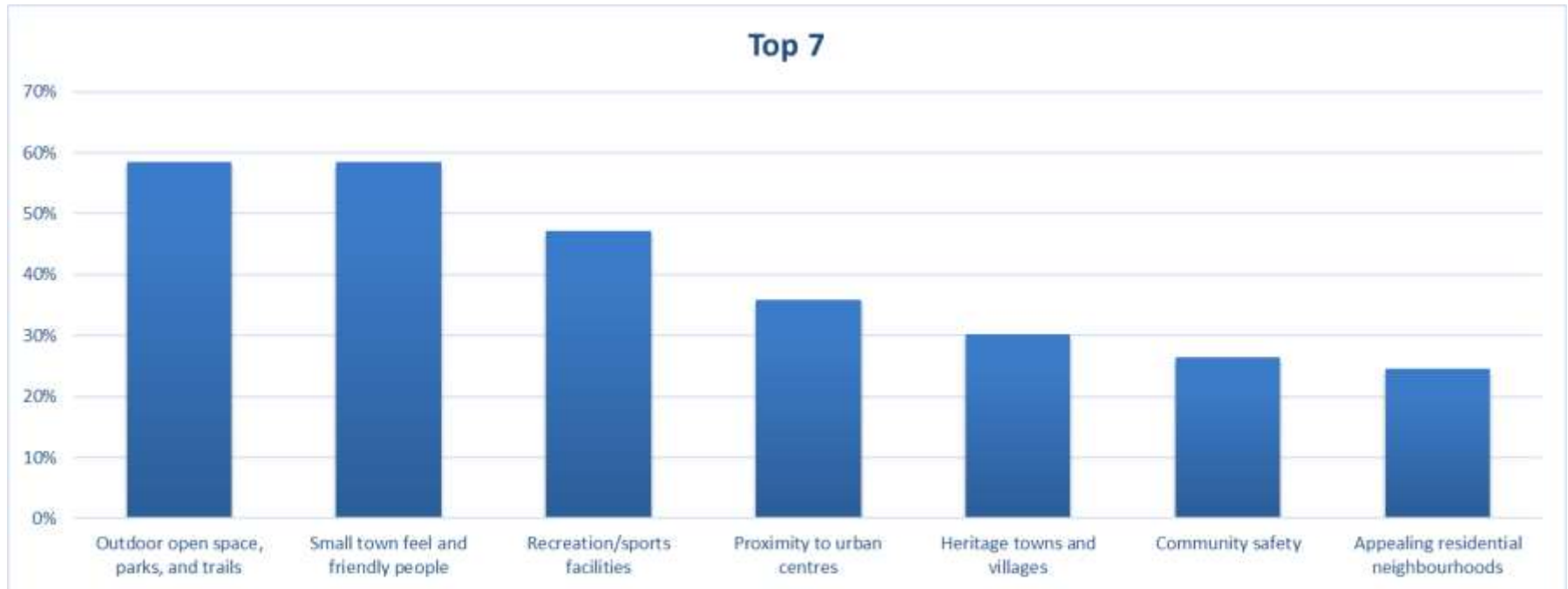


## Introduction

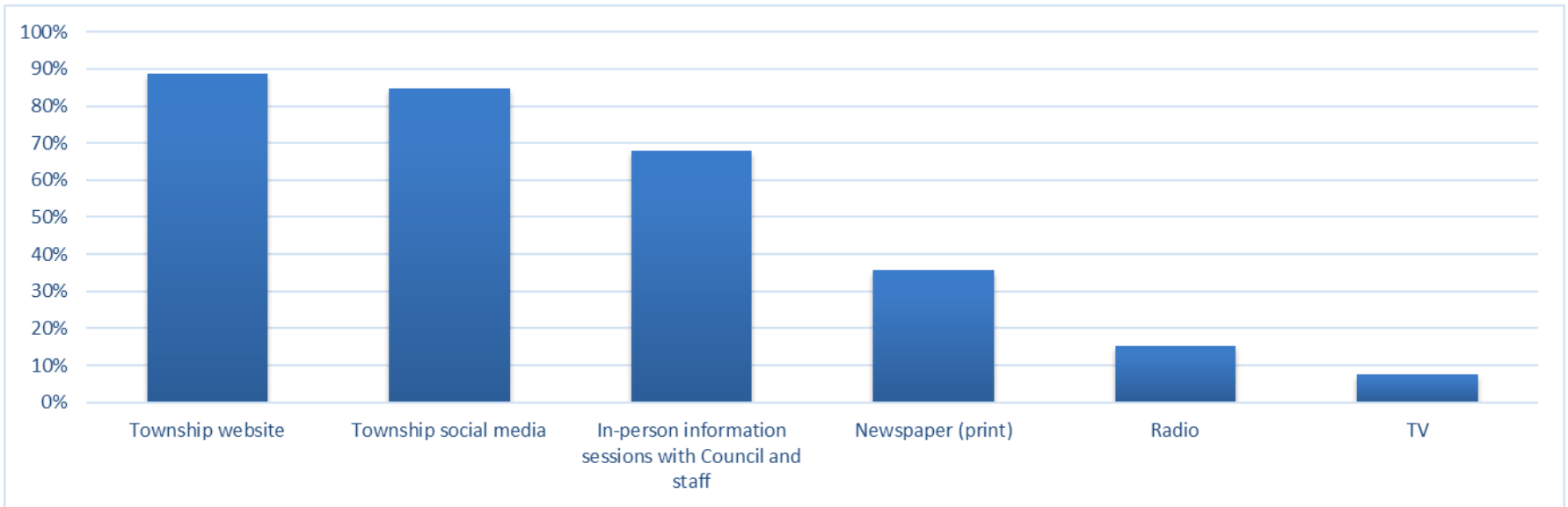
- An online questionnaire was created to capture input from Township staff, with 61 employees completed this questionnaire.



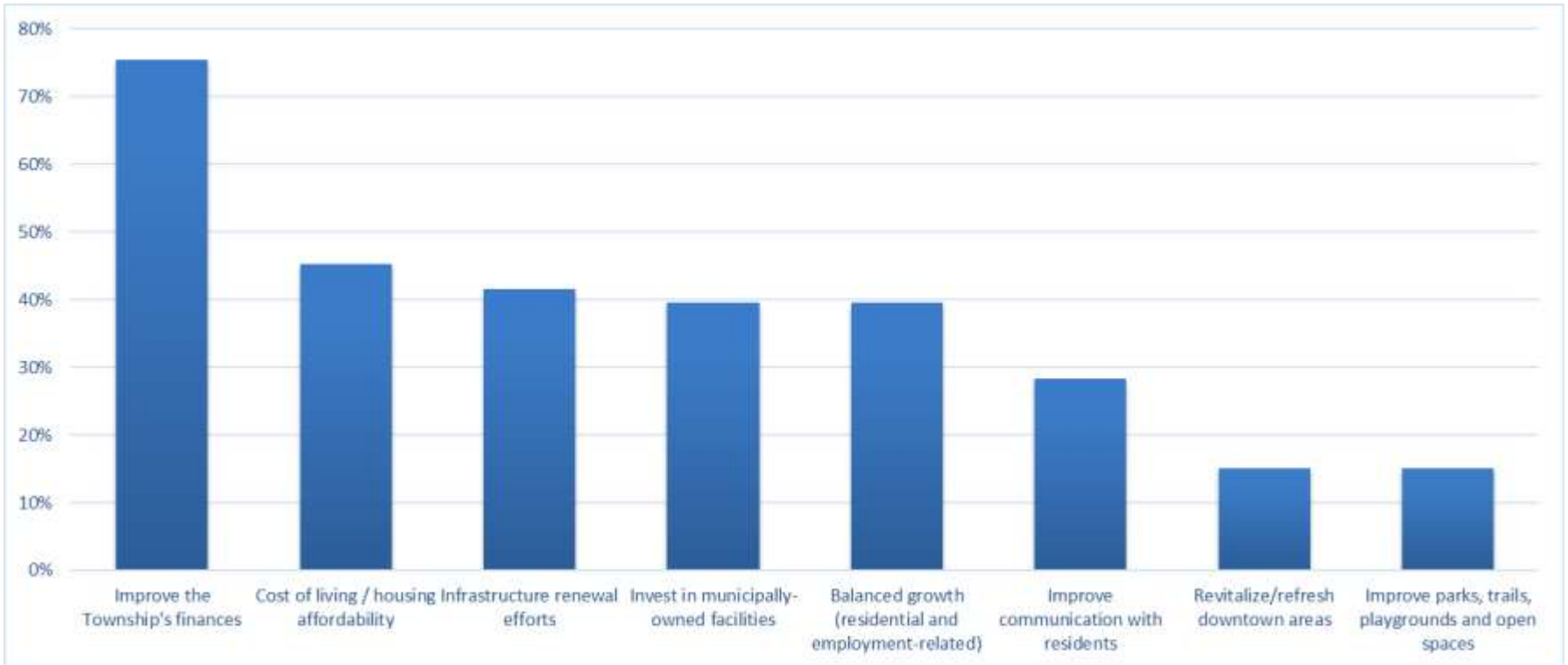
**Question:** Rank the below features that you think make Wilmot a great place to live. The below graph shows the top choices from staff participants – 58% selected “Outdoor open space, parks & trails” as either their first, second or third preferred choice followed by 57% selecting “Small town feel & friendly people” as either their first, second or third preferred choice.



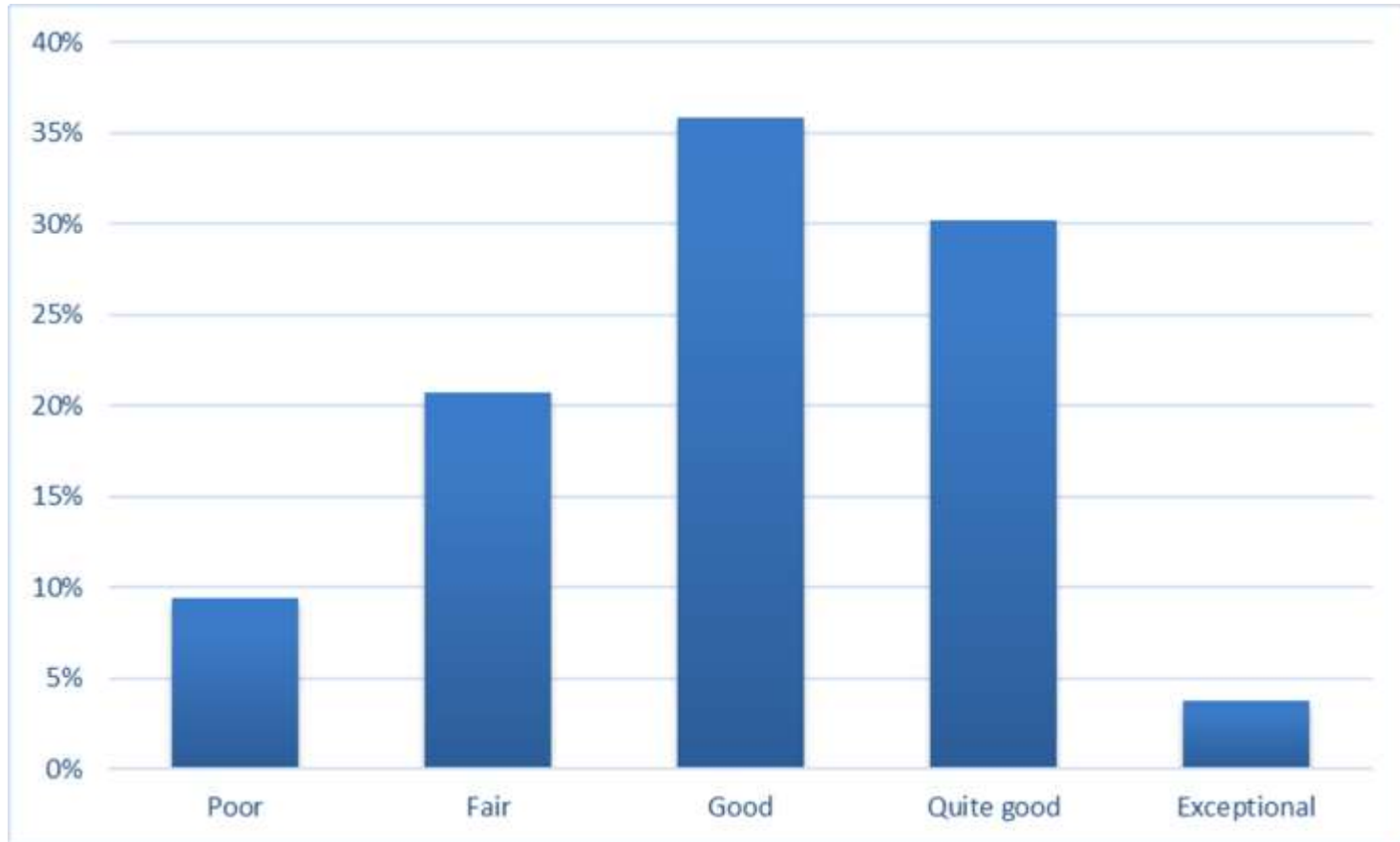
**Question:** From your perspective, rank the below communication methods based on how you think citizens would prefer to learn about Township issues/events/initiatives. The below graph shows the top choices from staff participants – 89% selected “Township website” as either their first, second or third preferred choice followed by 85% selecting “Township social media” as either their first, second or third preferred choice.



**Question:** Rank the following challenges that you think require attention during this Council term. At 75%, “Improve the Township’s finances” was the preferred choice of staff.



**Question:** How effectively does the Township manage its employees? The below graph indicates that 70% selected either “Good”, “Quite good”, or “exceptional”.





**Question:** Our Township is committed to attracting and retaining the excellent members of our team. What can we do to ensure that our staff know how much we appreciate them?

## Most Common Responses (open field question)

- Competitive wages/benefits/vacation time/bonuses (12)
- Small gifts / Township “swag” / gestures / informal thank-yous (9)
- Staff recognition / appreciation / social events (6)
- More appreciation of staff from Council and CLT (5)
- Address staff workload/workload balance issues (4)
- More training / professional development opportunities (4)
- Improve internal communication (3)