Clearview Township Strategic Plan

Bill Irwin
_Huron At Western, birwin6@uwo.ca_

Kane Faucher
_Huron at Western, kfauche@uwo.ca_

Follow this and additional works at: https://ir.lib.uwo.ca/huron_management-and-organizational-studiespub

_Citation of this paper:_
2017. Irwin, Bill and Kane Faucher, Clearview Township Strategic Plan. Clearview Township, Ontario
Table of Contents

Message From the Mayor .................................................. 2
Message From the CAO .................................................... 3
Introduction ................................................................. 4
Planning Process ........................................................... 6
Strategic Priorities .......................................................... 8
Timelines ................................................................. 12
Tactics ................................................................. 20
Performance Evaluation .................................................. 23
Message From the Mayor

On behalf of Council, it is my pleasure to present the new Clearview Township Strategic Plan.

The Strategic Plan focuses on five key pillars that will guide the direction of the municipality for many years to come. The pillars include:

- Recreation and Culture
- Identity-Marketing-Promotion
- Economic Activity
- Quality of Life
- Governance

Within each pillar, there are a series of tactics that aim to support the overall goals/objectives of the municipality. Combined, the 22 tactics will position the municipality in a direction of success, growth and prosperity.

It has been exciting to see this strategic plan develop. Through consultation with council members, staff, residents, stakeholders and businesses, the process provided valuable insight into the Township’s opportunities and challenges upon which the pillars and tactics were created.

Now that the plan is in place, the real work will start as staff begin to implement the various tactics. Our commitment is to work collaboratively with the public and community to ensure a successful future for Clearview Township.

I would like to extend my sincere gratitude to everyone in the community that assisted with the planning and creation of this Strategic Plan. This is definitely an exciting time to live in Clearview.

Mayor Christopher Vanderkruys
Message From the CAO

I am proud to present the 2017 – 2022 Clearview Township Strategic plan. As a continuation of the previous strategic plan, this new plan highlights key areas of focus for the Township over the next five years to create a solid foundation for success.

I would like to extend my appreciation to members of Council and staff for working diligently throughout the consultation and planning processes. In addition, I would like to thank the residents, businesses and community groups that provided comments and feedback throughout the process and during the community consultation session.

Throughout the implementation of the plan, the Senior Management team will work to ensure that department business and budgets align with the pillars, objectives and tactics. This approach will position Clearview Township in a direction of success while also strengthening the community that we call home.

I would like to close by extending my gratitude to the previous Clearview Township Council for the vision and direction which helped developed the initial 2008 Strategic Plan.

Stephen Sage
Chief Administration Officer
Introduction

The picturesque and welcoming Township of Clearview remains committed to being a progressive and compassionate community, and the enclosed Strategic Plan Revision and Process reflects those values and the will of Council. With its numerous assets and potential, Clearview is ideally positioned to meet the challenges of today and tomorrow, and this document functions as a blueprint in courageously embracing those challenges in order to better deliver core services and improve quality of life for all those who choose to live, work, and play in Clearview. The Township of Clearview shares common challenges with other similarly situated municipalities, but its strong leadership, willingness to be proactive, and its dedicated staff and volunteers places it in a robust position.

This document includes a full accounting of the planning process, strategic pillars, and detailed tactics and timelines. As accountability is an important aspect of municipal strategic planning, included here is a means to measure success over the short, medium, and long term.

Apart from what may be considered “housekeeping items” and must-have infrastructure projects, it will be noted that this plan revision differs from the original strategic plan’s focus on economic development and planning, and instead pivots to core issues of marketing, outreach, and identity-construction as a means of better defining the vision of Clearview, and thus enabling its ability to attract new residents, businesses, and developers to partake of this vision. The official vision statement as it appears in the 2008 Strategic Plan states, “Clearview will be a unified community consisting of vibrant
towns, villages and hamlets in a rural setting, drawing from the strength of its unique and diverse heritage to embrace the future.” It is our team’s view that this proposed addendum to the existing Strategic Plan keeps in the spirit of its stated vision, and that no changes to its vision or mission statements is required.

It is our view that it will be essential, on a go-forward basis, that the Township of Clearview focus on issues of identity and how it can best position itself on an opportunistic basis, and distinguish itself from similarly-sized communities.

In addition, the plan’s later stages will develop a set of performance metrics, to measure progress towards the key strategic pillars identified. These will also enable administration and council to make mid-course corrective action decisions, if necessary, on the various strategic tactics on an on-going basis.

It has been our distinct pleasure in working with the Township of Clearview and the community in this exciting new chapter.

Compass Point Consulting
Dr. Bill Irwin
Dr. Kane Faucher
Planning Process

The Township of Clearview retained the services of Compass Point Consulting for the purposes of revising the existing Strategic Plan given current and anticipated changes in the municipal and broader landscape since the initial Plan’s development. Moreover, they were also retained to provide guidance and facilitation in how to evaluate and measure progress of each of the developed tactics.

The key difference between a Strategic Plan and a revision thereof would be the role of the public stakeholders. In the former, a Strategic Plan is developed largely from the ground-up, whereas a revision modifies and improves upon an existing plan. As such, there is a difference in how the public is involved in the process. Rather than a full public consultation, a revision does not require public input as such prior to ratification of changes; however, it was decided by Council, Staff, and the consulting firm that a public validation session would be held to involve interested members of the public in this exciting revision in order to best ensure consensus.

Emerging out of our facilitated discussions with the senior management team, a review of the original strategic plan, a collectively edited draft of strategic priorities, and a review of the municipality’s data, our team has constructed what we feel would be the winning conditions for advancing the municipality’s agenda in several key areas. The
alignment of Council and senior management is key to delivering on the success of these strategic priorities.

Our firm presented the draft strategies and tactics at a special session of Council on March 16, 2017. Emerging from that session were a number of suggestions for revision that we incorporated into the document. It was decided that the draft, in its revised state, would be presented at a public validation meeting conducted on May 3, 2017.

The public validation session was well attended, and the outcome was largely positive and informative, fine-tuning our tactics. Members of the public were apprised of the strategic priorities and associated tactics, and their input was encouraged. This input was factored into another round of revisions.

Our team was also retained to provide facilitation and guidance on how to best approach evaluating and measuring success through performance management and setting goals. We have provided a section in this document outlining some of the outcomes of that process.

The strategic priorities (“pillars”) identified in this document is complemented in detail by associated tactics. In some cases, tactics appear duplicated across more than one priority. This is purposeful and speaks to shared, interdepartmental responsibilities and cooperation. Tentative timelines have been provided and agreed upon with respect to time contingent factors, taking an opportunistic approach, and in line with budgetary realities. As such, the timelines are recommendations, but unanticipated situations - positive or negative - may mean slight changes to these timelines. Our team has “baked in” a relative degree of flexibility in the timelines to allow for changes as needed or required.
Strategic Priorities

Our team identified five key “pillars.” They are as follows:

- Recreation and Culture,
- Identity-Marketing-Promotion,
- Economic Activity,
- Quality of Life,
- and Governance.

Each of these pillars includes a series of tactics to realize, and deliver upon, these strategic objectives. We herein provide further comment on each of the priorities, and the rationale for their inclusion. These pillars also do not conflict with the goals of the existing 2008 Strategic Plan, which include economic development, growth and development, municipal services, community heritage, and service excellence. It should be noted that many of the strategic priorities cited in the original Plan have been achieved, and that these additional pillars serve two functions: 1. Strengthen and enhance on the gains of the original Plan; and, 2. Shift the focus to other priority areas, particularly in terms of identity marketing and quality of life considerations.
Recreation and Culture

One of the key measures of quality-of-life considerations (QoL) in any community would be the extent to which there are affordances and amenities in support of that community’s recreation and culture. As a community is much more than a place to work and live, support in this area functions as a means of both attracting new residents and businesses, as well as retaining same. Effective recreation and cultural programming can be done in collaboration with a number of partners, including service clubs and local businesses, which may then distribute the burden of service provision. There are already unique cultural assets in the community that could be better promoted, and opportunities for expansion. What may be considered lacking at this juncture is a up-to-date comprehensive plan to direct and guide such initiatives, including a range of current policies related to the aims of the current strategic plan.

Identity-Marketing-Promotion

It is generally in the best interests of local governments and the communities they serve to promote the municipality as an ideal place to live, work, and play. We see an
opportunity for the Township to take the lead in promoting and marketing all the municipality has to offer, while also being open to new opportunities as they arise. However, in order to achieve this objective, there must be some degree of consensus over the identity of the community with its diverse publics. The question turns on “who are we” well before one can proceed to answer the subsequent question of “how do we promote ourselves.” There are a wide range of actions the Township may consider toward this goal. The identity-marketing-promotion triad is an interdependent whole, and attention is required to each of these to deliver on an effective strategy.

Economic Activity

Our environmental scan strongly indicates that the Township has a strong agricultural core, and that there may be opportunities to further nurture this economic asset. That being said, we also see an opportunity to expand economic activity beyond agri-business, and to seek new opportunities in diversification, such as incubators. To some degree this area can be viewed as an economic “who-we-are” exercise. Although it is somewhat out of the direct control of the municipality to determine which kinds of business choose Clearview as its base of operations, there are a number of things that can be done to provide a more amenable climate for attracting businesses, working in tandem with a comprehensive marketing plan. We also include infrastructure needs under this category given the vital role this plays in attracting and retaining businesses.

Quality of Life

The Township of Clearview has an expressed and enduring interest in improving the quality of life of its residents. Already, Council has signaled its strong support for mixed-use housing that is attainable across the income spectrum, opportunities for aging-in-place, and the public transit pilot program of public transit. Movement towards these tactics clearly establishes Clearview as a progressive, mindful community that has
taken an unprecedented step compared to similarly-situated municipalities. Demographic shift does point to a “greying population,” and as such it becomes ever more important that the Township continue to consider issues of housing, mobility, and dignity. Under this pillar, we are recommending that the Township continue pursuing and enhancing these initiatives, as they promise to better distinguish the community as a compassionate one. Moreover, any results that emerge from a recreational master plan might also speak directly to improvements to the quality of life by providing a range of amenities and services tailored to the community to improve health and wellness.

**Governance**

A responsive and engaged Council is key to the delivery of strategic priorities, as there is flow-through from policy to planning to process. Some configurations for the setting of priorities and policy development may or may not be ideally suited to some Councils. In essence, aiming for the most ideal configuration for timely decision-making and policy setting is vital to the mission of the municipality, and providing clear guidance to staff in the operationalization of policies and plans.
Tactics

The tactics presented here are not prioritized in terms of importance despite the use of a numbering system. This is not an exhaustive list; throughout the life of the plan, other tactics may arise that conform to the strategic priorities.

Recreation and Culture

1. Recreation Master Plan: There is a real and identified requirement to have a much better understanding of the needs of the community with respect to recreational services, and what role can be played by the Township in delivering on these, be those connecting bike lanes, modifying parks usage, adding new services in high demand areas, de-duplication, etc. For this tactic, we recommend that the Township invest in the development of a comprehensive Recreation Master Plan that may function as a recreational services blueprint, as well as providing a more predictive outlay for expenditures.
2. **The Hiring of a Recreation and Culture Position**: The implementation and operationalization of the Recreation Master Plan requires a dedicated member of staff to be tasked with the sustainable management of recreation and culture in the community. At present, that function seems to be split with none of the sustained focus required in building bridges with recreation and culture groups in the community, and to advocate for same.

3. **Development of Recreation Programming**: As a corollary to the first two, developing programming that is tailored to the needs and desires of the community will improve quality of life and potentially increase usage and participation by the community.

4. **Tourism Programming**: There is a need to identify what makes Clearview a tourist destination, and to ramp up efforts to increase drive-through traffic and encourage the celebration of all the Township has to offer. There are, at present, several under-explored opportunities that might form part of a marketing and promotion plan.

5. **Small Halls Promotion**: one of the signature cultural assets of the community would be the successful Small Halls. We would recommend a means by which this can be better positioned for optimal promotion and celebration given the proven value it provides for the community.

6. **Signage and Wayfinding**: At present, there seems to be no consistent use of signage or a directive policy. We would recommend a standardized means by which signage can appear in the community to avoid visual clutter and be more effective in the promotion of businesses and other groups. With respect to wayfinding, there is an opportunity to use signage to better direct visitors and residents to many of the cultural, recreational, and business amenities. Wayfinding might also include the use of wayfinding apps, QR codes, etc., to be determined by a Marketing/Promotions Director.

7. **Policies on Heritage Designation / Alignment with CIP**: Clarity is required to determine which buildings should receive heritage designation, and this ought to align with a Community Improvement Plan.

8. **Downtown Beautification**: It may go without saying that there are opportunities to beautify some of the downtowns in the various settlement areas, such as in Stayner. This may include a wide range of options including frontage improvements and landscaping features.
Identity-Marketing-Promotion

1. “Sell it, Say it”: Given the large number of historically significant, culturally distinct, and unique assets that Clearview possesses, it is of measurable benefit to adopt a view of “marketing out” as well as “marketing in” to better raise awareness of these features. Clearview has much more to offer than simply the Creemore Brewery, and there are opportunities here to promote all Clearview has to offer. By collaborating with various businesses and cultural groups, there may be further opportunities to celebrate and promote these features on a broader scale. This may include the optimal use of social media channels and advertisement placement in regional tourism magazines. Many of the options would be part of the job description of a Marketing/Promotions Director.

2. Promoting Community Theatre and Music: As part of an overall marketing and promotions plan, one of the key strengths in the community is its theatrical and musical events that could benefit from more promotional assistance by the Township. Cultural investment of this nature can result, if done well, in a 10-to-1 return on investment when taking into consideration peripheral impact on local businesses.
3. *The Hiring of a Marketing/Promotions Position*: The planning, organization, and liaison function for marketing and promotion of the Township both internally and out-bound ought to be the sole task of a dedicated staff member. We are in a position to describe some of the specifics of the skills such a position would entail.

4. *New Policies of Tying Funding to Unified Identity*: Various local sports teams, for example, may receive municipal funding - and that is to be encouraged. However, we recommend that funding be tied to an agreement with such groups that they embrace a unified identity in rebranding as Clearview to move beyond the legacy of pre-amalgamation communities. We would also recommend something similar with respect to new businesses who wish to include location in their business names that they be solidly encouraged to include “Clearview” as opposed to simply adopting the name of the settlement area.
Economic Activity

1. **Agribusiness Cultivation**: Agribusiness remains one of Clearview’s key economic drivers, and there are some unique opportunities for expansion into other agricultural markets. Beyond industrial crops such as feed corn and soy, there are niche markets in micro-herbs, cannabis, etc., that might help further diversify this strong economic sector while also further positioning Clearview as a progressive and forward-thinking community.

2. **Small Business Attraction and Incubation**: We have identified an opportunity for Clearview to become an attractor for new businesses and potentially digital start-ups. New policies geared to attracting new businesses may be welcome to make Clearview a top choice for setting up new businesses. There are a number of means by which this can be achieved, but it may also be included in the Marketing/Promotions Director role to determine specifics.

3. **Infrastructure Improvements**: Whether or not there is desire for significant growth of the community population, there is a significant need to repair and maintain the existing infrastructure for the benefit of existing residents and businesses. We would urge that existing infrastructure improvement projects continue, particularly the issue of the bridges.
Quality of Life

1. *Mixed Housing Stock (with focus on attainable housing)*: There is an identifiable need for attainable or affordable housing. There is a significant portion of lower income people who work in the service industry, and commute to Collingwood. Collingwood housing prices may not be attainable for this group, and although housing costs in Clearview might be more reasonable, the lack of housing stock mitigates against meeting this need. Clearview has been exceptionally amenable to development in this area, but this has not been suitably reciprocated by the pace of housing starts by developers who have acquired land. There may be some opportunities to court developers who specialize in attainable housing.

2. *Public Transit Expansion*: Clearview is to be lauded for taking the unprecedented step for a community of this size of addressing the need for public transportation, particularly given an aging population (some of whom are no longer capable of driving to medical appointments). We recommend expanding this program, contingent upon the results of the pilot phase. This would also appeal to younger generations who may prefer commuting using public transit than operating their own vehicles for reasons of convenience, environmental principles, etc. We would further recommend, at a later point in the pilot phase, to perform a cost-benefit analysis and a public survey to determine usage in Stayner, and a separate survey to determine interest in other Clearview communities.

3. *Promoting “Connected Communities”*: The reality of the 21st century is that a modern society needs to be connected in a technological sense, not just for recreational purposes, but as a necessary economic reality. To ensure the long-term sustainability of Clearview, a focused effort needs to guarantee that all residents of the community (not just those located in the major settlement areas) have access to hi-speed internet service. This service in place would assist Clearview in both attracting and retaining a younger generation as well as be a significant contribution to a growing home/"cottage" industry.

4. *Facilities for Aging in Place*: A lack of a range of options for senior accommodation, aging in place facilities, can have significant threefold impacts for the community. One, the community's seniors, at a certain age, leave the community having negative emotional impacts for family members left behind, two, seniors choose not to retire in the community and as such do not contribute to its economic benefit, or three, seniors stay in their local home for an inordinate amount of time, not freeing up the property for a younger family to move to the community. To ensure that the community attracts and retains its older citizens, while having the stock of existing family homes turnover attracting a younger generation to the community, Clearview needs to investigate and implement a range of policy and program options focus on accomplishing this goal.
Governance

1. Define Council roles on Representational Boards, Commissions, and Committees: Clearview, as with most similar rural communities, has a long and rich tradition of volunteer engagement in community based services. In point of fact this engagement adds significantly to the municipality’s quality of life, and could not be replicated with paid staff positions as the costs would be significantly too prohibitive. To work effectively, these Boards, Commissions and committees require a regularized relationship with council, as they are in fact de-facto municipal bodies. This regularized relationship requires formalized lines of reporting and communication, as well as a common understanding of budgeting and legislative processes. A review and renewal of existing practice would be beneficial for all, helping to build and reinforce common understanding and delivery of service.
2. **Enhance Council Engagement:** We have noted that Clearview council has a significantly positive relationship with the community and staff. We have also noted that this relationship takes many forms, some formal and many informal. Informal relations are quite special and plays a strong role in the constructive municipal culture. Still, to ensure that alignment in action and understanding between council and staff remains as positive in future, a review of the formal means and methods of council engagement could be undertaken. This review would examine all existing process and decision-making models with an aim to facilitate council's continued effective governance in a go-forward fashion.

3. **Advocacy Role with Respect to Provincial and Federal Decisions that Impact Clearview:** The municipality, like many other Ontario communities, finds itself in an ongoing reactive position to the policy decisions of senior levels of government. The reality of this situation is that many decisions are made at another level of government, while the costs are borne by the local community. There is a need to both maintain existing relationships with other locals governments and associations in terms of developing a common front addressing this scenario, as well as seeking other means to influence and "get their message" to senior governments. Clearview may consider prioritizing which issues, relationships, are key and pressing to the local community and allocating time and effort in an according fashion. This would lead to an effective targeting of effort and hopefully better influence a more positive outcome for these issues.
Timelines

One of the essential ingredients in developing tactics is in being mindful in developing reasonable and feasible timelines for the successful delivery of outcomes. With that being said, unforeseen circumstances can easily derail the best of intentions, which is why we recommended that these be treated as tentative guidelines with enough flexibility to account for possible changes that are responsive to any unanticipated scenarios. A part of ensuring flexibility is in not strictly defining what is meant by short, medium, and long term given that these are relative and must be mapped against planning and budgetary cycles.

Some timeline items will have more than one goal or phase attached to them, and so would be considered “ongoing.” We reflect that in the timelines by multiple checkmarks under their appropriate time span.

Timeline changes are not always negative or reactive in scope; there are occasions when achieving an outcome is assisted by either external factors (such as funding) or internal (staff outperforming expectations). In such cases, the next tactic in the timeline would be taken on.

The following presents the tentative timeline for deliverable tactical outcomes:
<table>
<thead>
<tr>
<th>TACTIC</th>
<th>Short-Term</th>
<th>Medium-Term</th>
<th>Long-Term</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recreation Master Plan</td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Rec/Culture Director</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recreation Programming</td>
<td></td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Tourism Programming</td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Small Halls Promotion</td>
<td></td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Signage and Wayfinding</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Heritage Designation Policy</td>
<td></td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Downtown Beautification</td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>“Sell it, Say it”</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Promoting Community Theatre and Music</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Marketing/Promotion Director</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Community Branding</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Agribusiness Cultivation</td>
<td></td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Small Business Attraction and Incubation</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>TACTIC</td>
<td>Short-Term</td>
<td>Medium-Term</td>
<td>Long-Term</td>
</tr>
<tr>
<td>---------------------------------------------</td>
<td>------------</td>
<td>-------------</td>
<td>-----------</td>
</tr>
<tr>
<td>Infrastructure Improvements</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mixed Housing Stock</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Public Transit Expansion</td>
<td></td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Promoting “Connected Communities”</td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Facilities for Aging-in-Place</td>
<td></td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Define Council Roles in regards Boards, Committees, and Commissions</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enhance Council Engagement</td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Advocacy Role in regards Provincial and Federal Governments</td>
<td></td>
<td>✓</td>
<td></td>
</tr>
</tbody>
</table>
Performance Evaluation

As the municipality seeks to deliver on its strategic priorities, we recommend a means by which this can be measured in the short and long term. Not only does it assist in evaluating progress on an ongoing basis to make alterations as needed (such as in resource allocation), but also permits the celebration of successes.

Our recommendation is that staff are provided with workshops and training on evaluation techniques, and in developing baseline data for useful comparison from year to year. The performance metrics ought to be identified and developed in such a way that they are tailored to each department and sensitive to the unique conditions of the municipal culture. We also strongly recommend that evidence-based decision making play a piloting role in the development and implementation of these performance metrics.

As a corollary to evaluating performance, our second strong recommendation would be to invite volunteer Boards to special sessions of Council once or twice a year to discuss best practices and problems that arise. Hosting this session should be done using a communications format or template to guide and facilitate discussion. Given the importance of volunteerism in the community for the delivery of some services and programs, stronger communications between volunteers and Council is important.
Introduction to the Evaluation Strategy

Creating the balanced scorecard is a critical step in the strategic process. So many organizations create a strategic plan and then dutifully ignore it because day-to-day issues/firefighting tend to take precedence. The scorecard periodically reminds the organization what the critical strategic issues are and gives the necessary feedback on the progress toward achieving them.

It is important to remember that the scorecard is like a scale. The scale merely provides you with feedback on how you are doing. In the same way, building a balanced scorecard will not improve organizational performance. It will simply give you feedback to know how well you are achieving your strategic direction.

Scorecard measures are typically a combination of lag and lead indicators. A lagging measure is based on past or historical results while a leading measure is a driver and measures the current process. Both types of measures are important to the Balanced Scorecard and accurately measuring performance. For example, a lagging procurement measure would be number of responses per solicitation and a leading indicator would be number of vendors registered.

A lag measure is defined as one that reflects an outcome, or present-day bottom-line result. The ultimate lag measure in many public sector organizations is customer satisfaction, which can be measured through surveys, number of complaints, etc. Surveys quantifying the level of satisfaction reflect the success / failure of all the things the organization has done to try and keep their constituency happy.

Lead measures are defined as those that drive future outcomes or bottom line success. Lead measures typically reinforce certain types of behaviour within the organization. For example, a government organization had developed a host of new processes to make it easier for their citizens to interact with them. Communication of the availability of the new processes was obviously critical to their utilization and success, so the government adopted a lead measure entitle "# of public outreach events". An outreach event had to fit certain defined parameters and was designed to get the word out regarding new processing options. (Note the logic that outreach events is a measure that will better inform the public, hopefully make it easier for them to deal with the state, and as a result drive customer satisfaction higher.) That makes the number of outreach events a lead measure that will theoretically drive the satisfaction lag measure. This measure reinforces the behaviour that the organization needs to take the time and effort to communicate specific information to its customers, thereby giving them the highest probability of success.
Developing Targets

Targets are used to define the performance measures success on achieving the desired outcome. The targets are normally set for a defined time frame, for example, monthly, quarterly, or for a fiscal year.Targets should also be linked to the performance appraisal system for employees. If this approach is used, a full one year of measuring targets should be completed before using the information for appraising performance. The targets must be achievable and realistic, yet challenging enough to make an impact on overall performance. Baselines must be set in which to measure the level of achievement. Historical data and peer performance are two ways where information can be obtained to set baseline performance.

The Balanced Scorecard is a living document and should be able to be modified and adjusted as goals and objectives are achieved and as internal and external environmental factors change. It is essential that accurate and comprehensive reporting tools are used to communicate the progress made over the reporting period. At each evaluation period, the results should be used to make adjustments in measure, targets, or initiatives as needed to keep the alignment of the department’s goals and objectives with the organizational goals and objectives. The overall success of the Balanced Scorecard will depend on how well the gap between the measured performance and the preferred performance is evaluated and addressed.

Barriers to a successful implementation of the Balanced Scorecard

- **Vision Barrier:** All levels of employees must be able to understand and embrace the vision, mission and values of the department. If there is resistance to acceptance of the vision, then the implementation of the scorecard may not achieve the expected success.

- **People Barrier:** The Balanced Scorecard links employee incentives to achieving the organizational strategy. Employees must be willing to accept this link and realize the long-term connection between day-to-day performance and long-term goals and objectives.

- **Resource Barrier:** An underlying concept of the Balanced Scorecard is that the budget is tied to the strategy. Especially in the public sector, the budget process is stretched throughout two or more years, so the tasks, goals and objectives that support the strategy must be developed in advance of the actual budget year implementation.

- **Management Barrier:** The importance of gaining and maintaining executive level support cannot be disregarded. The actions of top level management must match verbal support. If full support is not executed throughout the implementation of the Balanced Scorecard, too much time will be spent on reactive measures than strategic measures.
Critical Success factors

- **Commitment**: Commitment must be demonstrated at all levels of the organization, especially at the executive level.

- **Clarity**: The objectives of the program, and the underlying reason for the change should be understood by all employees and stakeholders.

- **Communication**: Communication should be an ongoing process and often checked to ensure that proper and timely communications are being practiced throughout the entire organization.

- **Accountability**: There should be clearly assigned and understood accountability for the process and results of the Balanced Scorecard program.

- **Performance Measures**: A system for measuring performance, that is positive, not punitive, must be developed and provide sufficient and accurate information to decision makers. Employee rewards and recognition should be tied to the performance measures through the employee evaluation process.

- **Link to Strategy**: The Balanced Scorecard at the department level should be clearly linked to the organization’s strategy. All objectives and tasks performed and measured should contribute to the overall progress toward success.

- **Reporting**: This is a critical factor that can be easily overlooked. Comprehensive reports documenting the success of the program, especially in a pilot program, can serve as tools for acceptance and expansion of the Balanced Scorecard program.

The following tables indicate the objectives and metrics associated with select tactics in Clearview’s revised Strategic Plan. This provides a non-exhaustive example of what may be expected in the development of key metrics; more detailed ones would be developed once the revised plan is ratified.
<table>
<thead>
<tr>
<th>Measurement Objective</th>
<th>Performance Metrics</th>
</tr>
</thead>
</table>
| Recreation Master Plan                 | • Budget for the contracting of a consultant specializing in recreation and cultural planning  
• Develop the RFP in consultation with the new Rec/Culture Staff Position to identify key priorities, timelines, etc.  
• Determine optimal timeline for the deliverable (no more than 6-8 months)  
• Evaluate how plan engages community and its feasibility  
• Post-Plan: measure no more than 5-10 key deliverables of the plan, measure for impact (5 years +) |
| Recreation and Culture Position        | • Develop a job description with clearly identified roles and responsibilities (best practices: investigate comparable positions in similarly-sized and situated municipalities)  
• Screen applicants and announce hire no later than March, 2018 |
| Tourism Programming                    | • Conduct attendance monitoring of each major cultural event  
• Explore the use of ticket/raffle instruments at events as a method for collecting postal codes to determine in-bound tourist rates and locations  
• Rec/Culture Staff lead will identify the venues and events for monitoring |
| Small Halls Promotion                  | • Initial task is to ask about the purpose of the small halls - community building, tourism, both?  
• Once purpose described, can begin to evaluate against purpose and determine both the means and methods of evaluation. |
### Measurement Objective | Performance Metrics
---|---
**Signage and Wayfinding**  | • Focus on aligning signage with a community brand  
| | • Remove all signs, and put up new signage that is standardized and possibly colour-coded by type  
| | • Signage and wayfinding initiatives contingent upon cooperation between new Rec/Culture Staff and Planning Department.  
| | • Conduct exit-surveys for both tourists and residents asking about navigability and community satisfaction  

**Policies on Heritage Designation**  | • Review the CIP and identify heritage assets to be given designation  
| | • Perform follow-up after designation to assess the economic, social, and cultural benefits impact the buildings and other physical amenities (for example, parks) produce  
| | • For each heritage designated property, list the above impacts in a matrix as part of conducting the annual review to be distributed to Council  

---

**Identity - Marketing - Promotion**

### Measurement Objective | Performance Metrics
---|---
**“Sell it, Say it”**  | • Measure earned media (community mention in media type and media reach)  
| | • Using this data, plus tourism data, pivot to strengths to capitalize on tourism initiatives  

**Tying Funding to Unified Identity**  | • Review grant beneficiaries, identifying those who are not currently using Clearview as group identifier  
| | • Create policy around tying new grant funding to promoting Clearview  
| | • Compliance check and review, find compromise with grant beneficiaries (for example, “Creemore in Clearview”)
### Economic Activity

<table>
<thead>
<tr>
<th>Measurement Objective</th>
<th>Performance Metrics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agribusiness Cultivation</td>
<td>• Measure how many jobs are created in this industry, square footage, quality index of wages, and impact on local economy</td>
</tr>
<tr>
<td>Small Business Attraction and Incubation</td>
<td>• Review industry types with a view to potential for growth and in attracting/retaining young people&lt;br&gt;• Match data against actual demand&lt;br&gt;• Target start-ups by industry type, and use marketing tools to attract those for which there is demand&lt;br&gt;• Annual review evaluation on how well these measures retain youth to offset out-migration</td>
</tr>
</tbody>
</table>

### Quality of Life

<table>
<thead>
<tr>
<th>Measurement Objective</th>
<th>Performance Metrics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mixed Housing Stock</td>
<td>• Identify developers who specialize in attainable housing and schedule meetings to determine interest&lt;br&gt;• Policy: develop policies to ensure land usage favours this kind of development by being opportunistic in the renewal of the Official Plan</td>
</tr>
<tr>
<td>Facilities for Aging in Place</td>
<td>• Identify the different seniors types (go-go, slow-go, and no-go)&lt;br&gt;• Measure impact this will have on services, recreation, and as a predictive tool for what facilities (plus capacity) are required</td>
</tr>
</tbody>
</table>
## Governance

<table>
<thead>
<tr>
<th>Measurement Objective</th>
<th>Performance Metrics</th>
</tr>
</thead>
</table>
| Define Council Roles on Boards and Committees | • Prepare and frequently update a list of all volunteers, with a focus on age and number of volunteers per Boards and Committees.  
• Launch an outreach program to attract young volunteers as part of succession planning |
| Advocacy Role | • Be selective of the top issues and priorities that matter to Clearview and participate in networking opportunities between different levels of government, and in nurturing partnerships with other municipalities |