



2018-2021 STRATEGIC PLAN

SEPTEMBER 2020
PROGRESS REPORT



► Progress Reports

Town administration monitors progress towards meeting the strategic goals, key result areas and initiatives, and provides regular reports to Council throughout the year, which are available to the public on the Town website. The annual Community Report, which is published and delivered to households in February, is another way that progress is reported to citizens. Reporting provides greater accountability, transparency and understanding of the strategic goals, progress and accomplishments. Council and administration's regular review allows us to evaluate how we are performing towards our strategic goals and to make adjustments as necessary to realign for success.

Progress Highlights

September 2020





Town Vision

The Town of Okotoks fosters a culture of resiliency - where people, businesses, ideas and sense of community thrive. Grounded by the Sheep River valley and supported by thoughtful planning and design, a strong local economy and a vibrant civic culture, Okotoks offers exceptional quality of life at every stage of life. Respect for each other and the natural environment makes Okotoks home.

Town Mission

The Town of Okotoks strives to create and nurture an environment in which people are able to pursue the fulfilment of their values, in harmony with the community.

Guiding Principles

The following guiding principles are the basis for long-term planning for our community and were developed by citizens.



Livable Okotoks



Inclusive neighbourhoods



Sustainable design



Vibrant civic culture and heritage



Active lifestyle



Strong local economy

More details descriptions of the principles, themes and values can be found at okotoks.ca/community-vision.

Progress Highlights

September 2020

Strategic Directions





Arts & Learning Campus

Provide Quality Infrastructure

The Town of Okotoks will strategically manage, invest and plan for municipal infrastructure to meet the community's current and future needs.

Key result areas & initiatives

Secure water and wastewater upgrades to meet community growth needs.

- Interim water solutions are secured to meet current growth needs.
- Long-term water solutions are secured and implemented.
- Wastewater upgrades are implemented.

Okotoks is a regional hub that helps the community to flourish.

- Partner and/or assist our regional neighbours with servicing gaps when feasible and seek partnerships with neighbours as required
- Create a long-term public facilities needs assessment and corporate land strategy that balances needs, funding availability, emerging trends and operating efficiencies.

We engage, promote and assist in seeking alternate infrastructure funding to meet the needs of arts, culture, recreation, sports and non-profits.

- Develop a partnership framework/model where users are partners as active community infrastructure contributors.
- Build community pride through and opportunities for philanthropic investment in the community.
- Develop a financing framework that clarifies shared responsibilities (including third-party stakeholders, & public, private, and non-profit grants) & links to the community accountability work.
- Build Phase 1 of the Arts and Learning Campus.

2018	2019	2020	2021	Status
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Provide Quality Infrastructure



Progress Highlights

- ✓ Short-term water needs have been secured through water treatment plant optimization and water license acquisitions for approximately the next 9 years of growth. In seeking long-term water solutions, Okotoks has partnered with Foothills County and signed a Memorandum of Understanding to collectively work with Alberta Environment for approvals for a conceptual regional water pipeline. Detailed design is planned for 2021. Pending approvals, construction may commence in 2022. The 10-year capital budget forecast will be adjusted to align with anticipated expenditures. Partnerships for funding long term regional water solutions will be established and opportunities for grants are being explored.
- ✓ The Town has reduced energy consumption at the Water Treatment Plant by 17% (227,834 kWh) and at the Wastewater Treatment Plant by 8.4% (254,204 kWh). Wastewater treatment plant upgrades continue, with commissioning of the combined treatment unit process in fall of 2020. Other process improvements are commencing that include solids handling and influent pump upgrades. \$5.5M grant funding from the Province of Alberta for wastewater treatment plant upgrades is anticipated.
- ✓ Construction of phase one of the Okotoks Arts & Learning Campus project is in progress. This project is an exciting downtown initiative that will enhance learning, cultural & economic development opportunities and is funded through reserves, partnerships and grants. Provincial grants will contribute \$18.3M towards the project.
- ✓ Okotoks launched a six-month regional waste collection pilot in June with the towns of Black Diamond and Turner Valley to provide waste services efficiencies and promote regional waste solutions. The services provided are paid for by the pilot municipalities and the program will be evaluated in November to determine next steps.
- ✓ A long-term public facilities needs assessment and corporate land strategy is underway to help plan for and balance needs, funding availability, emerging trends and operating efficiencies. The report will be presented to Council by the end of 2020.



Wastewater Treatment Plant upgrade and solar panels at the Operations Centre

Key result areas & initiatives

- Develop and implement strategies to attract the types of business that will make the downtown a repeat destination.
- Begin to implement elements of the Urban Design Master Plan and create an inspiring public realm to enhance quality of life and drive the investment that attracts people to the downtown core more often.
- Promote how downtown and its activities reflect our identity and distinctive character.
- Develop an events strategy that links to our identity and balances the need to facilitate tourism with opportunities for the community to come together.
- Prepare to host the 2022 Alberta Summer Games, should they be awarded to the Town, including engaging businesses and residents to showcase our community.

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Foster Economic Vitality



Progress Highlights

- ✓ The impact of COVID-19 has been felt throughout the world including our Okotoks community and local businesses. To ease financial burdens during the pandemic, Council passed a bylaw to permit Okotoks' property owners the option to defer the payments on 2020 taxes and utilities without penalty until August 31, 2020. The Town also waived a number of planning fees to provide financial relief and stimulate economic activity during the pandemic. The waivers included development permits for creating a home-based business, signs, business start-ups or relocations, construction or renovation to create secondary suites and garages, ending September 2020.
- ✓ At the onset of COVID-19, Council approved adding 'business retention' as a vital service to the Community Emergency Management Plan as recommended by the Emergency Advisory Committee. To help support businesses Okotoks provided dedicated staff to connect local businesses to the resources they needed such as federal and provincial supports, finding and sharing ideas to adjust services, shop local promotions, streamlining processes and reducing fees.
- ✓ The Town launched a pilot program to allow for temporary outdoor patios & retail spaces in parking areas and public spaces to help businesses meet restrictions on physical distancing. While the full Land Use Bylaw is under review for a rewrite, interim amendments occurred in 2020 to align with Council's strategic goals of encouraging economic vitality through supporting our local businesses with innovative approaches, enhancing organizational excellence through taking managed risk, and strengthening a healthy and safe community.
- ✓ Initiatives to improve customer service and experience with the business community include the purchase of customer relationship management (CRM) software, which will further improve the ease of doing business. A new online digital intake form has been developed to increase ease of doing business and reduce red tape. The form will determine the permits, inspections and licenses needed to open a business in Okotoks. Members of the business community were invited to assist with external testing of the new application.
- ✓ Construction of the Arts and Learning Campus is underway with an anticipated opening in the fall of 2021. The timing of this project provides a current economic stimulus while also contributing to long-term economic success and vitality for the Okotoks community.
- ✓ To foster other potential economic stimulus opportunities, Council approved a draft resolution regarding "Support for the Alberta Film Industry and Economic Diversification" to the Alberta Urban Municipalities Association for consideration at their fall 2020 Convention.
- ✓ In 2019 the municipalities of Okotoks and Black Diamond prepared a joint bid to host the 2022 Alberta Summer Games. Due to the impacts of COVID-19, the towns' Councils jointly requested to the Minister that the Alberta Summer Games be postponed to 2023.
- ✓ Due to COVID-19 and the need to limit social gatherings, community programs and events were reimagined. An example was the "reverse parade" where residents toured the town in their own vehicles to take in the floats and décor. Some businesses created displays by painting their windows, decorating a car or dressing up in costumes. This was an opportunity to generate more positive spirit in our community and show support for local businesses. Program instructors went online, as did promotion of local musicians, to enhance community connection while supporting businesses.
- ✓ Outdoor and indoor recreation are both important parts of life for Okotokians and also contribute to business activity. Starting the week of July 6, the Town began to re-open indoor recreation facilities in a phased approach. Programs and services were adjusted to ensure the safety of residents and employees.

Manage Community Growth



Progress Highlights

- ✓ The Town's first on-demand transit service provides residents and visitors the ability to move around Okotoks without relying on a personal vehicle. Users are able to book the service through an online app or over the phone and receive curb-to-curb transportation. To help support the community with self-isolation during the COVID-19 crisis, Okotoks Transit also assisted local grocery stores by delivering groceries to local residents. New vehicles arrived in June with additional features, including more seating and automatic doors, and these will replace the leased vehicles. Two-thirds of the transit vehicle cost was funded by the Province. Ridership saw a dip in March and April; however, it's been increasing steadily and has an average of 1900 trips each month.
- ✓ The Town of Okotoks is in the final stages of updating our Municipal Development Plan (MDP) to identify how we will achieve our community vision. This important statutory plan will guide long-term growth and development. The final draft of the MDP incorporates Council's strategic objectives including sustainability and managed growth and contains policy to direct developers to create more complete and distinctive communities. The first reading for the new MDP occurred in August with the public hearing in September.
- ✓ Okotoks has been an active participant in the Calgary Metropolitan Regional Growth Management Board to guide planning for the region, including opportunities for collaboration to meet the region's short and long term needs. A long-term growth survey for the region was promoted to residents in August.
- ✓ In April, a bylaw to expedite the process for secondary suite and dwelling approvals to improve options for affordable housing was passed. By July, secondary suite applications were already higher than the entire previous year.
- ✓ The Affordable Housing Task Force has been working with a consultant to complete the Affordable Housing Strategic Plan. The draft Plan will be presented to Council in October 2020.
- ✓ The Land Use Bylaw requires updating to respond to current and future needs of Okotoks, including policy direction from the Municipal Development Plan. A robust consulting team was assembled to prepare the new bylaw through a combination of best practices, technical research and policy implementation. Public and stakeholder participation workshops were held in February. Detailed internal review on the updated bylaw is in progress with external review and public engagement planned for this fall. A public hearing is planned for January 2021.



Promote Environmental Excellence

The Town of Okotoks will be the leader in environmental protection and preservation in the Province of Alberta.

Key result areas & initiatives

Promote and provide incentives for environmental related businesses to move and/or locate pilot projects in Okotoks.

- ★ Develop an aggressive strategy, including incentives, to attract environmental businesses to Okotoks.
- ★ Make strategic capital Investment in infrastructure to incent innovative green-business/ light industrial development/ employment centres.
- ★ Create opportunities to pilot environmental projects with public, private & non-profit partnerships.
- ★ Capitalize on public, private and non-profit relationships to increase business and/or employment opportunities that are aligned with environmental identity.

Expand on Okotoks' identity/reputation with new bold, innovative initiatives that demonstrate we are the leaders in environmental stewardship.

- ★ Focus energy on our identity as environmental leaders, bringing bold initiatives to Okotoks.
- ★ Complete the Environmental Master Plan (EMP) and select the highest priority actions to implement.
- ★ Complete the Climate Change Action Plan (CCAP) and select the highest priority actions to implement.
- ★ Ensure that the EMP and CCAP are aligned with the MDP to create synergy and reinforce primary focus.
- ★ Align updated provincial flood mapping with all master plans.
- ★ Partner with energy providers, & explore long-term energy generation options for Okotoks to increase self-sufficiency & reduce costs (e.g. solar, district energy, micro-generation, storage technologies).
- ★ Reduce energy consumption in Town buildings and fleet.

Promote and provide incentives for new environmental initiatives for both residential and commercial.

- ★ Create annual environmental initiatives to attract and reward residential and commercial businesses for environmental excellence.

[illegible]

- On track
- ▲ In progress
- ◆ Off target
- Future initiative

Promote Environmental Excellence

Progress Highlights

- ✓ In February, the annual progress report on the Town's Environmental Master Plan was provided to Council and can be reviewed on [Okotoks.ca](https://www.okotoks.ca).
- ✓ Two important long-term plans are nearing completion that are integral next steps to the Environmental Master Plan. The Natural Asset Inventory project has been completed and will be presented to Council in October 2020. It will inform the development of the wetlands policy and supports the goals of the new Municipal Development Plan (MDP). The Climate Change Action Plan is also underway with public participation planned for fall and the final plan presented to Council by year-end.
- ✓ The newly updated draft MDP contains bold policy related to Climate Change, Community Resilience, Environment, Parks, Recreation, and Natural Areas. Specific goals under the areas of Land and Nature, Sustainable Water, Local and Sustainable Food, Zero Waste, and Zero Carbon Energy are also included to guide the long-term outcomes of protecting the environment.
- ✓ Solar panels were installed on the roofs of the Town's fleet and ECO Centre buildings and became fully operational in April 2020. A \$430K grant from the Municipal Climate Change Action Centre contributed to the \$1M project.
- ✓ Demonstration plots showcasing alternate groundcovers have been installed adjacent to the Environmental Education Centre this summer. These plots will include interpretative signage funded by the Province of Alberta to educate residents on alternative groundcovers that require less maintenance and water than traditional turf and enhanced environmental benefits.
- ✓ Environmental education, awareness, and sustainability initiatives are promoted through Green Living Workshops, Environment Week, Water Conservation Rebate Program and the Environmental Education Centre. While major events, business and household visits were not offered due to COVID, many of the usual workshops and events went online. The repair café and bike repair events continued with adjustments to meet COVID restrictions and remained popular with residents.
- ✓ The Town of Okotoks made some significant additions to the Water Conservation 2020 Rebate Program, including adding a number of rebates for businesses and institutions and increasing the number of rebates for residential xeriscape projects. The rebate program was particularly busy in 2020—with many residents spending more time in their yards, landscaping projects were a popular activity.



Provide Strong Governance

The Town of Okotoks will provide strong governance including fiscal responsibility, open communication, public participation and strong inter-governmental relationships.

Key result areas & initiatives

Ensure that the Town's fiscal health is defined and communicated.

- Create a Financial Policy Framework including Reserves, Debt, Investment and Utility Policies.
- Ensure the Financial Policy Framework drives the updated budget process; adjusting where necessary.
- Conduct a comprehensive Utility Rate Review.
- Review offsite levies and align them with the new financial framework.
- Introduce an asset management framework and align with the new financial framework.
- Include public participation as part of the annual budget process in order to educate on services and costs, and gain understanding of community priorities.

Increase understanding of the issues various diverse Okotokian audiences have and adjust practices to ensure that Okotoks is known as a respectful and inclusive community.

- Gain an understanding of Okotokian audiences through various sources to better understand sociodemographic groups.
- Align Town services and programs with best practices for the Welcoming and Inclusive Communities initiative and the Truth & Reconciliation document.

Be active participants in regional governance, planning and partnership opportunities.

- Actively participate in Calgary Metropolitan Regional Growth Management Board to guide planning for the region, including opportunities for collaboration to meet the region's short and long-term needs.
- Seek opportunities for partnerships with public, private, non-profit organizations to deliver services that align with our community vision and strategic directions.

Develop a clear understanding of the Town's Strategic plan and vision for the future; promote and inspire actions that contribute to, and enhance that vision throughout the community.

- Assist Council in developing an ownership linkage strategy (i.e. a community charter including vision check-in) to enhance alignment and provide clarity around responsibilities, accountabilities & objectives.
- Review 2018-2020 Strategic Plan in early 2020 to adjust strategies and actions after all master plans have been created.

2018	2019	2020	2021	Status
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● On track
● Off target
▲ In progress
■ Future initiative

Provide Strong Governance



Progress Highlights

- ✓ In February Council amended their 2018-2021 Strategic Plan to add two important strategic initiatives that will contribute to economic vitality—the Arts & Learning Campus and the 2022 Alberta Summer Games. Due to COVID-19, the Games have been requested to be delayed to 2023.
- ✓ While the original 2020 budget included an approved increase of 2% in property taxes, a revised forecast was created due to COVID-19 and is based on a 0% tax increase. To achieve this new forecast, Town services in many areas were temporarily reduced due to facility closures and reduced revenues; and, over 80 staff were temporarily laid off. The 2020 capital plans and one-time operating projects were also reprioritized.
- ✓ Okotoks continues to be a leader in financial stewardship. From the June 2020 Canadian Federation of Taxpayers Municipal Spending Report, Okotoks was rated as 5th lowest spending per capita, of the 74 mid-sized communities evaluated.
- ✓ The 2021 budget guidelines were approved by Council in June and include a 0% increase to property taxes, no changes to service levels, and no additional staffing. Public input on the 2021 budget will occur in September and budget deliberations occur in November 2020.
- ✓ A review of offsite levies is in progress and includes engagement with the development community. Offsite levies are fees collected from the developers to fund community infrastructure. Findings and recommendations from the offsite levy review will inform an update to the offsite levy bylaw planned for late 2020.
- ✓ The Town of Okotoks Governance Framework establishes a set of principles that, taken together, describe a complete operating system for the organization. Council approved 10 governance policies to enable governance in an efficient and accountable manner. These policies allow Council to focus on the larger issues, rigorously evaluate the accomplishment of the organization and focus on leading the organization.
- ✓ As a result of COVID-19, an increased need to use technology to conduct Council business was needed. Since March, all Council meetings have been conducted virtually including several additional meetings of the Emergency Advisory Committee. Increased online communication with residents and businesses include the Mayor's regular live video updates and increased social media activity.



The Town of Okotoks will strengthen our social fabric and enhance the health and safety of our residents.

Promote community accountability where residents actively contribute to the safety, health and wellbeing within their neighbourhood and their community in a variety of ways.

- Update policies and bylaws to incorporate cannabis legalization plans at the local level.
- Develop a holistic, community-wide approach to the legalization of cannabis ensuring community safety is maintained.
- Develop a communications plan for residents, visitors and business on the Okotoks cannabis model.

- On track
- ▲ In progress
- ◆ Off target
- Future initiative

Strengthen Healthy and Safe Community



Progress Highlights

- ✓ At the onset of COVID-19, the Town continued efforts to protect the health and safety of citizens and staff, while still providing high quality service to the community. The Town transitioned away from in-person contact at the majority of its facilities. Town services continued to be available to the public by phone, email and online. No interruption to essential services occurred.
- ✓ As part of the relaunch efforts, the Municipal Centre reopened for in-person services on June 15. Recreation facilities re-opened July 6 with a phased approach including some restrictions, such as a decrease in the number and types of programs or activities offered and the maximum number of participants, along with modified hours of operation at all the facilities. Booking in advance is the new norm for aquatic and fitness activities. Drop-in classes were offered at Natural High Fitness. Most activities must be booked in advance as there is limited capacity and need for contact tracing. The Town worked closely with recreation user groups to meet public health restrictions for a return of organized sports in the fall.
- ✓ The emergency management team continues to use the organization's business continuity plan to guide decisions, adjust to the swiftly changing situation, and assess, prepare for and prioritize service impacts. The Town's priorities continue to be maintaining critical services, supporting public health objectives, protecting staff and vulnerable citizens, and ensuring long-term business resumption.
- ✓ Prior to the impact of COVID-19, Okotoks was well underway in its business continuity planning, completing phase 1 in 2019 and phases 2 and 3 in early 2020. Phase one focused on critical services, which are those that put life safety in danger, when they are not provided, and must be up and running within 24 hours of a disruption. Phase two focused on vital services, which may impact the environment or the Town's reputation, and must be in place within 72 hours of a disruption. Phase three focuses on necessary services, which are typically resumed within 7 days. However, the COVID-19 pandemic has created a unique situation where the disruption of some necessary services will continue for the foreseeable future, due to a constantly evolving situation.
- ✓ Each year the Town of Okotoks updates its flood readiness plans and 2020 was no exception. This year, the flood readiness plans were updated to include the challenges to respond to a flood emergency in a pandemic environment.
- ✓ Town of Okotoks Council proclaimed Friday, May 1 as First Responders Day in Okotoks and introduced the Ignite the Light initiative to thank our local heroes.
- ✓ An update of the Social Wellness Framework will be presented to Council in September 2020. The framework will identify successes and gaps and recommend actions, accordingly. The framework is to guide the Town in building a safe, connected, caring, and creative community. Social wellness is one of three components of community sustainability, integrating and overlapping with economic and environmental sustainability.

Enhance Organizational Excellence

The Town of Okotoks will be recognized as leaders in public service.

Key result areas & initiatives

Review internal sustainability to develop a staffing and resourcing plan that meets the vision, while creating a resilient and agile Administration that anticipates and responds to a rapidly changing environment.

- ★ Document core service levels and create a resourcing strategy to meet required service levels.
- ★ Review strategic and master plans to determine the resourcing needs necessary to achieve the prioritized outcomes.
- ★ Monitor and maintain a high level of customer satisfaction, obtaining third party verification and adjusting practices as necessary.
- ★ Research emerging trends and implement best practices to secure Okotoks as a leader in public service.

Regularly review Town services and service delivery options to determine sustainable community service delivery and gain a better understanding of needs versus wants.

- ★ Develop and implement a multiyear schedule to review service and service delivery options, prioritized based on cost, impact and regional growth plans, along with identified areas of interest for residents.
- ★ Research ‘smart city’ initiatives to determine opportunities and needs for Okotoks.

Be active participants in regional governance, planning and partnership opportunities.

- ★ Regular strategic conversations are held between Council and administration to ensure alignment, clarity and necessary adjustments are made, and a strong relationship is maintained.
- ★ Provide public participation opportunities that engage the public in strategic conversations, including introducing focused task forces with specific mandates and timelines.
- ★ Develop a process for amending the Strategic Plan.
- ★ Demonstrate achievement of all strategic and master plans through progress reporting of accomplishments and corporate performance measures.
- ★ Develop and publish performance measures for core services.

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Enhance Organizational Excellence



Progress Highlights

- ✓ Service delivery review options are requested annually by Council and reviewed during budget deliberations. The focus for 2020 service reviews were identified as “affordable housing” and the “business change of use” (processes that support business permits and applications). Upon receipt of the Affordable Housing Strategic Plan this fall, the Town will identify the appropriate role for the municipality in support of affordable housing.
- ✓ To further foster public participation opportunities that engage citizens in strategic conversations about community, an online question and answer session was held by Council on the Arts & Learning Campus. Two task forces were created last year with specific mandates and timelines. The Affordable Housing Task Force will conclude their term this fall and bring forward their recommendations to Council. The Urban Deer Task Force will resume meetings in fall 2020, with their term extended to May 31, 2021.
- ✓ Okotoks is quick to embrace new technologies and initiatives when launching or re-establishing new business processes. The new Okotoks Transit service allows users to book their rides through an online app or over the phone and receive curb-to-curb transportation within the town’s boundary. The app provides estimated wait times and allows users to view real time movement of the shuttle. Frequent adjustments in service were necessary to adapt to COVID-19 and demand, including offering grocery delivery for several months to support residents who were self-isolating.
- ✓ To further improve customer service and access to information, the Town of Okotoks is undertaking a website refresh project. The new site is currently being tested and planned to be launched in late September.
- ✓ The Town has adapted and increased services to the public with online and social media. Several online programs, events, and info sessions were offered to the public as a result of COVID with many continuing. Okotoks Rec Centre was one of the first in the region to reopen.

COVID-19 playground signage



Off-track initiatives AND Recovery Plans

The Town administration has put the following into place for off track initiatives.

Economic Vitality



- ✓ Due to COVID-19 short term priorities in economic vitality have been the main focus such as business disaster recovery.
- ✓ Consultation for implementation of the Urban Design Master Plan was carried out with the business community. Downtown streetscape improvements were deferred to minimize further impacts to business already impacted by COVID-19. Re-engagement with the business community to determine next steps is planned.

Community Growth



- ✓ The Affordable Housing Strategy is a few months behind schedule, but will be completed in fall 2020.

Strong Governance



- ✓ Work continues on the offsite levy (OSL) bylaw that's planned for completion by end of 2020. This bylaw provides a mechanism for the Town to transparently recover capital costs associated with new development and equitably split the costs between those that benefit. A process is in place to review the draft OSL bylaw with the development community prior to going to Council for approval. The OSL policy work is planned for completion in late 2020.

Heathy & Safe Community



- ✓ The Town will continue with COVID-19 relaunch efforts under Provincial guidance and direction. Impacted service levels will be re-established as conditions allow and in alignment with property tax levels set by Council.

Environmental Excellence



- ✓ Due to budget and staffing restraints in 2020, many objectives in the EMP have been postponed to future years.

Organizational Excellence



- ✓ The corporation's focus has been related to service level reductions focussing on priority day to day customer service. Projects like Smart City and Corporate Performance Measures are a lower priority.





supporting the
2018-2021

STRATEGIC PLAN

growing up from strong roots