

2018-2021

STRATEGIC PLAN

FINAL SUMMARY REPORT

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 fulfillment 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.



Nooks and
Crannies Festival

Photo credit: Julianna Aiello



Executive Summary

A Strategic Plan is Council's living document and centres the organization on the priorities and moving the organization forward. The Town of Okotoks 2018-2021 Strategic plan is based on strategic directions established by Council in January 2018:

- ✓ Provide quality infrastructure
- ✓ Foster economic vitality
- ✓ Manage community growth
- ✓ Promote environmental excellence
- ✓ Provide strong governance
- ✓ Strengthen a healthy and safe community, and
- ✓ Enhance organizational excellence

With the Town of Okotoks 2018-2021 Strategic Plan coming to a close, this presents us with the opportunity to look back at what has been accomplished, what we are working on and what has been put on hold to focus the organization with ongoing change and new opportunities since the plan was first implemented.

To reflect opportunities and needs of the community, Council reviewed and reprioritized the plan yearly. When Council reviewed priorities in early 2020 they added Affordable Housing and the Art and Learning Campus initiatives to the strategic plan.

Since the final 2018-2021 Strategic Plan was approved by Council in May 2018, there have been many initiatives completed. The following pages sorted by each Strategic Area provides some of the key accomplishments achieved through the plan.



► Message from CAO

A strategic plan provides purpose and direction. It is a series of connected and complementary goals that guide the strategies and actions of the organization as it works towards a shared vision of the community. Together, all the various parts of the Strategic Plan outline the priorities and opportunities for change in the community. The strategic plan is the primary planning document used by the Town of Okotoks and covers a four-year planning timeline that is aligned with the municipal election cycles. It is aspirational in nature and creates a sense and picture of the community that we want to see and experience. It includes the unique yet complementary roles of Council and Administration to realize the success of the Strategic Plan.

Council's role is to lead and establish the strategic direction. Council identifies the key goals of change that it wants to see in the community. It is Council's direction to Administration for the development and creation of strategies that allow the vision to unfold. Administration's role is strategic implementation. Administration identifies the key strategies and actions that will facilitate the direction established by Council. Administration guides, monitors, evaluates and reports on the implementation of the strategic plan. In Okotoks, we do this twice a year, and then report on the success of the entire four year strategic planning cycle. Administration's work planning, reporting and budgeting are all aligned with the strategic priorities of council.

Strategic Planning process

Council has 3 roles that can not be delegated:

1. Establish the policy & governance framework for the Town;
2. Be the informed voice of the owners; and
3. Assure organizational performance

Roles of Council and Administration





Strategic Planning process

What and Why vs. How

The hourglass is a visual representation of the connected, but distinct functions of Council and Administration: the “what” and the “how. Council’s focus is reflective in the top half of the hourglass, or the “what”; Administration is focused on the bottom half, or the “how”.



2018-2021 Priorities

During this four-year strategic planning cycle, Council had established clear priorities where changes were required. Those non-negotiable priorities were:

1. Securing a supplemental water solution,
2. Ensuring understanding of the housing affordability crisis and how to ensure access to affordable housing,
3. Advancing economic development and becoming the easiest place to do business in Alberta,
4. Transforming outdated planning documents to provide a new vision for growth and development of Okotoks,
5. Designing and implementing Okotoks Transit,
6. Seizing opportunities when presented, to deliver services that align with our community vision and strategic direction,
7. Develop a Long-term Financial Health Framework for the Town
8. Developing and implementing the Environmental Master Plan,
9. Developing and implementing the utility rate structure review,
10. Developing and implementing a Public Participation Policy,
11. Creating and implementing the Council Governance Framework.

Over the next 11 pages you will find a summary of the work done on each of these priorities, including the major milestones and outcomes.

Photo credit: Corrine B.





Sheep River, photo credit: Angie Gaffney

PRIORITY 1

Secure a Supplemental water solution

Securing a supplemental water source has been a strategic priority of Council, and has been worked on, for more than 20 years. Although Okotoks has enough water for the next nine years, it is an important consideration at this time, based on the current economic recovery goals, and ensuring Okotoks is ideally positioned to be a part of the rebounding Alberta economy.

Major Milestones		Outcome	Status
✓	Acquire Sheep River water licenses and optimize the Wastewater Treatment Plant	Secured short-term water needs for approximately the next nine years of growth.	★
✓	Develop a Water Allocation Policy	This new policy provides a simpler approach to managing the available amount of water capacity to new developments.	★
✓	Optimize Wastewater Treatment Plant capacity	Work is being completed now on the Wastewater Treatment Plant to handle additional growth.	▲
✓	Purchase land for water storage	Land was purchased for the purpose of water storage to support a proposed regional water pipeline project.	★
✓	Establish partnerships with the region	Okotoks partnered with Foothills County to design and construct a raw water supply from the Bow River.	★
✓	Design and Construct a supplemental water pipeline	<ul style="list-style-type: none"> • Preliminary designs are complete. • Working on receiving approvals from provincial and federal regulatory authorities and additional funding through the Provincial Government. 	▲
✓	Acquire Bow River Water License	Upon the completion of the new supplemental water pipeline, the Bow River water license acquisition can be approved.	▲

Learn more: www.okotoks.ca/WaterSolution



PRIORITY 2

Understand the Housing affordability crisis and how to ensure access to affordable housing

In 2018 Council identified the need to increase the diversity and accessibility of housing as a strategic priority. A housing needs assessment completed by the Town in 2019 indicated that nearly half of renters were spending more than 30 percent of their income on rent & utilities, which is nine percent higher than the provincial average. One in five Okotoks' residents were spending over 50 percent of their income to pay for a place to live. Okotoks is the municipality with the fourth least affordable housing in Alberta, and rental vacancy is among the lowest in the province. Many people who work in Okotoks cannot afford to live here, there is no emergency shelter or transitional housing, and young people who grew up in Okotoks cannot afford to remain living in Okotoks. Below are the major milestones towards adding affordable housing options in Okotoks.

Major Milestones		Outcome	Status
✓	Conduct a Housing Needs Assessment	Provided information on the Affordable Housing Crisis in Okotoks.	★
✓	Form an Affordable Housing Task Force	Created by Council to develop and provide recommendations on a long-term strategy to increase affordable housing and create a more inclusive community for Okotoks.	★
✓	Develop an Affordable Housing Strategy	The 77 action items developed by the Affordable Housing Task force focused on increasing the diversity of housing in Okotoks to meet the needs of all residents at all ages and stages of their lives.	★
✓	Develop Affordable Housing Five-Year Action Plan	Administration created a roadmap for all 77 action items in the Affordable Housing Strategy.	★
✓	Create Below Market Housing Incentive Grant Program	This program incentivizes developers to build below market housing units, which will then be sold to affordable housing providers and used as intended for a minimum of 20 years.	★
✓	Create Secondary Suite and Accessory Dwelling Grant Policy and Program	This policy and program was created to encourage homeowners to upgrade or construct secondary suites and accessory dwelling units. This will increase housing choice and available options for affordable housing.	★
✓	Secure land for future affordable housing opportunities	The Town purchased land in the D'Arcy neighbourhood for affordable housing opportunities.	★
✓	Provide the foundation for Affordable Housing units	The Town transferred 2.3 Acres in the D'Arcy neighbourhood to the Brenda Strafford Society and Westwinds Communities to advance affordable housing choices in Okotoks.	★

Learn more: www.okotoks.ca/AffordableHousing

PRIORITY 3

Advancing economic development & Become the easiest place to do business in Alberta

In 2018 Council identified the need to facilitate a healthy economy in Okotoks where quality jobs and business opportunities are abundant. Economic development plays a critical role in driving economic growth in the economy, creating and sustaining jobs as well as facilitating an improved quality of life for the community.

To ensure that Okotoks is an easy location for businesses to operate, efforts have focused on building an environment that is inviting to new investment while also being conducive to existing business growth. Reducing red tape, creating more intuitive and user friendly processes and actively working with and listening to the business community to strengthen relationships are all foundational pieces to achieve Council's goal of making Okotoks the easiest place to do business in Alberta by 2025.

Major Milestones		Outcome	Status
✓	Host business roundtables	<ul style="list-style-type: none"> In consultation with local businesses, the Town identified and implemented improvements in regulations and processes to make doing business in Okotoks easier. Participated in the establishment of the River District Business Association and Okotoks Entrepreneurial Ecosystem to facilitate collaboration with and among business stakeholders. 	★
✓	Implement a "One-Stop-Shop" support system	Established Community Growth and Investment as the primary Town contact for business development, who assist businesses navigate Town permits and requirements.	★
✓	Establish improvements in service delivery	<ul style="list-style-type: none"> Transitioned business licensing to a fully digital service, thereby reducing the application response time by two thirds. Introduced the Business Beat e-Newsletter. Introduced an industrial tax incentive policy. Created innovative virtual reality tours on available industrial lands. Saved businesses money and time by providing site licensing on a project basis, instead of separately licensing each individual sub-contractor and trade working on the project. 	★
✓	Develop new Municipal Development Plan (MDP)	Aligned the new MDP with the Town's environmental sustainability goals to prioritize and facilitate the approval and development of employment (i.e. non-residential) lands.	★
✓	Rewrite the Land Use Bylaw (LUB)	Expanded business opportunities across the community and broadened permit exemptions with the new regulatory framework within the new Land Use Bylaw (LUB).	★
✓	Complete a Commercial & Industrial Development Study	Identified potential development opportunities and priority projects that will become the focus for development and business attraction.	★
✓	Provide support to businesses during COVID - 19	<ul style="list-style-type: none"> Completed Town website updates to provide ongoing resources and links to COVID-19 information, including funding sources. Mental health programs were delivered by partners in the Okotoks Entrepreneurial Ecosystem with support from the Town. Introduced a temporary patio pilot program to provide business owners with service delivery options. Implemented a mobile vending pilot project to enhance business owners' service delivery options. Waived over \$12,000 in commercial Development Permit and Certificate of Compliance fees. 	★



PRIORITY 4

Transforming planning documents to Provide a new vision for growth & development

Several key plans have been developed, or entirely rewritten, to ensure future development is sustainable and provides a high quality of life for residents. The Municipal Development Plan (MDP) is one of the Town’s most essential statutory plans and is used by Council and staff to make decisions about land use, infrastructure investment, and community service priorities. The goals for the new MDP were adapted from the One Planet Living Framework, an entrepreneurial charity, which aims to invent and deliver practical solutions for sustainability that helps individuals and communities live within the means of the Earth.

The new Land Use Bylaw has simplified rules and processes to achieve ease of doing business and reduce red tape, and has more flexibility to allow for innovation that can adapt to market changes, which will ultimately improve business retention and growth.

Together, these foundational documents will ensure Okotoks’ continued future growth and prosperity, through innovative, complete neighbourhood design that provides economic, social and environmental sustainability for all people.

Major Milestones		Outcome	Status
✓	Develop a new Municipal Development Plan (MDP)	<ul style="list-style-type: none"> • Prioritizes long-range planning of employment lands over residential; • Facilitates the development of employment-rich industrial lands and vibrant and attractive mixed-use centres; • Encourages the development of flexible, affordable commercial spaces; • Focuses on attraction of institutions and businesses to create a more sustainable economy; • Ensures culture is a contributing force in the economy. 	★
✓	Rewrite the Land Use Bylaw (LUB)	<ul style="list-style-type: none"> • Simplifies regulations and is more user-friendly; • Focuses more on active transportation users and removes minimum vehicle parking standards; • Incorporates flexibility to allow for innovation in business types and operations; • Exempts a broader range of businesses from development permit requirements; • Introduces a new mixed-use land use district to contribute to housing choice and affordability, live/work goals, and complete communities; • Introduces fewer, but more flexible land use districts. 	★
✓	Complete a Downtown Urban Design Master Plan	Provides a long-term vision for development in the downtown by embracing environment-friendly infrastructure and by creating inviting public spaces, active streetscapes and architectural innovation while maintaining historical character.	★

Learn more: www.okotoks.ca/plans



PRIORITY 5

Design and Implement Okotoks Transit

Over the years, residents have consistently indicated that providing Okotoks with public transit was a priority, and Council had made a commitment to provide residents with sustainable transportation options that had the flexibility to access neighborhoods that were not initially built to facilitate transit, as well as reduce carbon emissions.

In February 2018, the Town had an operational study completed to guide the creation of local transit service in Okotoks. Development of the service considered technical expertise, industry best practices, public participation, and the local context to identify a transit service that is right-sized and meets the needs of the community. The goal, as part of the Town’s Environmental Master Plan, is to grow local access to transit and increase transit trips by 25 percent by 2033.

Major Milestones		Outcome	Status
✓	Develop an affordable service design	<ul style="list-style-type: none"> Developed a customer-first service with an approved fee, guided by extensive public input, that is affordable while designed to help offset operation costs. Designed a ‘made for Okotoks’ on-demand, curb-to-curb model (i.e. no routes and no schedule) that is more cost-effective than a traditional fixed-route system. Implemented a less costly model that did not require bus stops, shelters, and other amenities as vehicles are able to stop anywhere that is a safe place to pull over. 	★
✓	Launch a multi-purpose and flexible service	<ul style="list-style-type: none"> Developed a flexible service that can be scaled up and down, based on demand. Temporarily adapted service in 2020 during COVID-19 to deliver groceries instead of passengers. In only its second year of operation, 55,000 passengers have used the service (as of August 31, 2021). Provided guidance and insight into our transit model to other municipalities across Canada. 	★

Learn more: www.okotoks.ca/Transit

PRIORITY 6

Seize opportunities when presented

to deliver services that align with our community vision & strategic direction

One way to realize strategic priorities and set a successful course for the long-term health of a community is to capitalize on unique opportunities when presented. The following opportunities align with a number of Council's strategic directions, most notably fostering economic vitality, capitalizing on partnerships, promoting environmental excellence, building quality infrastructure and managing community growth.

Major Milestones		Outcome	Status
✓	Arts and Learning Campus Phase 1	<ul style="list-style-type: none"> Collaborated with partners and stakeholders to design and construct a building to accommodate for long-term post-secondary education, an enhanced library experience, increased vitality downtown and increased economic development potential. Phase 1 includes an expanded Okotoks Public Library, as well as space for Christ the Redeemer Catholic Schools, Bow Valley College, Community Futures Highwood, Foothills School Division and prime commercial space. 	★
✓	Regional Service Delivery: 1. Waste Management 2. Recreation	<ul style="list-style-type: none"> Capitalized on an opportunity to increase efficiencies and associated cost savings; increase the diversion rate for municipally-managed residential waste; and, optimize the useful life of the regional landfill by implementing a pilot garbage collection project with the Towns of Turner Valley and Black Diamond, as per the goals of the Regional Solid Waste Management Plan (RSWMP). After a successful pilot project, the Town of Okotoks signed a three-year agreement to provide garbage service for the Towns of Turner Valley and Black Diamond. The Town of Okotoks is providing the management of staff and programming at the Dr. Lander Memorial Pool in the Town of Turner Valley, to help achieve consistency in service levels, sufficient staffing within the region and efficient operations. As a result the Town of Okotoks has now entered into a three-year operating agreement with the Town of Turner Valley. 	★ ★
✓	Riverfront Property Acquisition	Purchased 28.8 acres of sensitive river valley land, previously the Okotoks bible camp, to provide future recreational opportunities that Okotokians value for their quality of life.	★

Learn more: www.okotoks.ca/news



photo credit: Nicole Orsi Barioni

PRIORITY 7

Develop a Longterm Financial Health Framework

The development of a 10-Year Capital Financial Forecast and a 5-Year Operating Budget Forecast highlighted the need for Council to enhance financial policies and address sustainability in a more holistic way. The strategies, policies and methods within the Long Term Financial Health Framework bring clarity on an approach for financial decision-making and continuous long-term planning.

Major Milestones		Outcome	Status
✓	Approval of the Framework	<ul style="list-style-type: none">• Helps ensure the Town has the financial capability to meet strategic goals and continue to deliver services into the future.• Identifies all the levers that contribute to financial health and what needs to be done to enhance accountability, reporting, and transparency.	★
✓	Update Reserve Policy	<p>This policy establishes, maintains and manages reserve funds to:</p> <ul style="list-style-type: none">• Maintain and improve Okotoks' working capital requirements;• Provide clarity on the purpose and use of reserves and future funding requirements;• Address Off Site Levy Capital Reserves to track use and funding activities; and• Provide stabilization for fluctuations in operating and capital activities.	★
✓	Updated Offsite Levy Policy	<p>Realigned and adjusted the policy to:</p> <ul style="list-style-type: none">• Account for the current state of the economy and reflect a decrease in projected growth assumptions;• Better align with Council's strategic objectives and proposed changes to the Municipal Development Plan; and• Add flexibility to incent commercial and industrial development when delivering off-site levy infrastructure.	★
✓	Update Investment Policy	<p>Provides the ability to effectively manage funds and investments to demonstrate fiduciary care of municipal funds; returns generated can be used to help achieve certain organizational objectives.</p>	★
✓	Review Library Funding Framework	<p>Ensured library services are maintainable now and in the future, through understanding the financial impacts of the relocation of the library building and providing financial statements to Council.</p>	★

Learn more: www.okotoks.ca/council-policies

PRIORITY 8

Develop and Implement the Environmental Master Plan

The Town of Okotoks has committed to promote environmental responsibility and be a recognized leader in environmental stewardship. As such, administrative policies and guidelines have been developed to steer the Town along this path of environmental sustainability.

Through taking part in a Climate Resilience Express Project, it became clear that the effects of climate change were already apparent in Okotoks and were expected to become more severe over time. The impacts to our community could be numerous and diverse, giving rise to uncertain consequences, for infrastructure and services, property, the local economy and environment, and the health and lifestyles of citizens. While the Okotoks Climate Resilience Express Action Plan was developed from this project, the Environmental Master plan was developed shortly thereafter as a longer term plan to address sustainability.

The EMP was developed as a living document that connects the Town's Community Sustainability Plan, the Municipal Development Plan and the Town's long-term vision to develop a community and culture of resiliency in the most holistic and sustainable manner possible.

Major Milestones		Outcome	Status
✓	Develop and approve of the Environmental Master Plan (EMP)	The EMP is a comprehensive plan designed to help Okotoks achieve its vision as a thriving, sustainable community. It outlines a set of strategies targeting climate change mitigation and adaptation, ecological protection and enhancement, urban landscape design, water conservation, waste reduction, and green economic growth.	★
✓	Develop a Natural Asset Inventory	<ul style="list-style-type: none"> Natural and Naturalized Asset Inventory prioritizes and protects the connectivity and integrity of local ecosystems. This Inventory will be used to help create strategies that reduce Okotoks' ecological footprint, and enhance environmental protection. The results of the inventory have been shared with numerous municipalities throughout Alberta, as well as some from out of province. The inventory has received national recognition, being awarded the 2021 Canadian Association of Municipal Administrators (CAMA) Environment Award. 	★
✓	Development of a Climate Action Plan	The Town set an emissions baseline and completed the Climate Action Plan, which lays out actions to reduce emissions in Okotoks by 30 percent by 2030 and reach carbon neutrality by 2050.	★
✓	Minimize the generation of greenhouse gas emissions and air pollutants	<ul style="list-style-type: none"> Built the Arts and Learning Campus (ALC) to meet the Leadership in Energy and Environmental Design (LEED®) Gold standard. Introduced the Clean Energy Improvement Program Bylaw, which allows property owners to obtain low interest loans through the municipality for energy-efficient property renovations, with repayment facilitated through the property tax structure. Installed a rooftop solar PV system at the Okotoks Operations Centre, which has produced 750 MWh of energy for the wastewater treatment plant, and reduced greenhouse gas emissions by 294 tonnes (equivalent to planting 8,776 trees), in just over its first full year of operation. Installation of sustainable ice flooding systems at all Town ice surfaces will save \$20,000 in annual utilities and more than 300 tonnes of carbon. 	★
✓	Increase water conservation efforts	<ul style="list-style-type: none"> The community of Okotoks continues to be below the national average for water usage. The popular Water Conservation Rebate program increases the amount of water-wise yards in Okotoks, reducing outdoor potable water consumption. The program expanded to include drought-tolerant plants, and provide larger rebates for households installing xeriscape landscapes. Continued efforts to decrease water consumption and infrastructure improvements resulted in the ability to push back the timeline for supplemental water needs for approximately nine years based on a growth rate of 1-2% annually. 	★

Learn more: www.okotoks.ca/EMP

★ Complete ▲ In progress

PRIORITY 9

Develop and

Implement the utility rate structure review

A utility rate structure review (including storm, along with water, sewer, and waste) was identified as a 2019 priority in Council's Strategic Plan and as part of the recently approved Long-Term Financial Health Framework. The goal was to ensure an equitable system that is built for Okotoks, identify areas for improvement, and bring the Town's utility rate structure in line with industry best practices across North America. Ultimately, the review and recommendations will guide the Town in ensuring it improves equity, improves asset sustainability, ensures stable utility rates and continues to support our commitment to conservation.

Major Milestones		Outcome	Status
✓	Conduct Utility Rate Structure Review	<p>This comprehensive review identified several areas for improvement:</p> <ul style="list-style-type: none"> • A new base fee structure, based on meter size for all customers. This aligns with Industry Best Practice applied widely among North America and reflects the increased size and capacity of infrastructure required to support larger servicing as the community grows. • This structure adjustment supports Council's philosophy of "The more you use, the more you pay" and aligns with the Environmental Master Plan objective of reducing outdoor water demand by 20 percent by the year 2030. • A shift to implement an Asset Management Investment Plan (AMIP). This transfer of appropriate funds to a capital reserve for utilities will ensure that Okotoks is well-positioned to meet ongoing service expectations of safe and reliable water services. 	★
✓	Develop Utility Policy	<p>Ensures the public utility systems provided by the Town are built upon the following fundamental objectives:</p> <ul style="list-style-type: none"> • Financial sustainability • Promotion of conservation • Provision of revenue stability • Equitable rates • Fees and rates are easy to understand and administer. 	★
✓	Implementation of the Review	<ul style="list-style-type: none"> • Adjusted the fixed rates for water utilities water meters based on meter size to create a more equitable system for the Okotoks community. • Adjusted the water tiers and moved to a metered equivalence approach, thereby taking a true user-pay approach, so that those that use more water pay more. • Commenced increasing the stabilization reserve for future water infrastructure needs. • Changed the utility rate structure to support Council's objectives, including reduction of outdoor water demand by 20%; alignment with the Fiscal Health Framework; financial self-sufficiency and return to tax base of utilities; improvement in the equity among users; and the improvement of asset sustainability. 	★

Learn more: www.okotoks.ca/utilities

PRIORITY 10

Develop and Implement a Public participation strategy

Council is committed to being accountable to and acting on behalf of owners (i.e. residents and those who own or operate a business in Okotoks). Council understands there has been a shift in democracy and endeavours to give citizens a voice and take ownership of decisions being made in our community. The Public Participation Strategy and Toolkit identifies how stakeholders can provide input and how the Town will identify these opportunities for dialogue. It is used to establish guidelines, tools and processes to ensure consistent, ongoing conversations with the public in a way that develops relationships, in order to help Council become an informed voice of the community.

Major Milestones		Outcome	Status
✓	Create Public Participation Strategy and Toolkit	Creation of a Strategy and Toolkit that guides the organization in enhancing citizen participation opportunities going forward and is based on the Spectrum of Public Engagement, produced by the International Association for Public Participation (IAP2).	★
✓	Create Public Participation Policy	Provides clarity on what level of public participation is needed for any given issue and clearly communicates “the promise to the public”. It identifies the approaches and circumstances of engagement, and educates the public on the type of participation is being used for any given issue.	★
✓	Develop Council Committee Principles Policy	Used this policy to align the existing Public Advisory Committees with the Public Participation Policy and Council Committee Principles Policy to create more meaningful opportunities for public input and participation in Council decisions.	★
✓	Develop Council Community Connector Policy and Plan	<ul style="list-style-type: none"> • Strengthens the relationship and linkage between Okotoks Town Council, the owners of the Town, and the policy-making process. • The events from the plan allow Council to listen to concerns, suggestions and ideas from residents and share updates about projects and initiatives happening in the community. 	★
✓	Public Engagement in Action	<p>Several ways public participation has been implemented in the last four years include:</p> <ul style="list-style-type: none"> • Introduction of the Mayor’s regular, live Facebook updates that began during COVID-19 as a way to keep owners informed and make Council accessible for dialogue with the community. • Affordable Housing and Urban Deer Task Force participation. • Annual Budget, Community Household, Business Recovery 2020, and RCMP surveys. • Comprehensive and multi-phased public participation activities for updates on long-term planning and framework documents such as the Municipal Development Plan, the Environmental Master Plan, Local Transit Plan, and the Land Use Bylaw (LUB) rewrite. • Proposed playground upgrades, downtown design and vitalization, and future upgrades to Northridge Drive. 	★

Learn more: www.okotoks.ca/have-your-say

PRIORITY 11

Create and Implement the Council Governance Framework

A governance framework is an important tool for effective Council oversight. Governance through this set of integrated principles brings authority and accountability while enabling effective decision-making. It enables Council to govern in an efficient and accountable manner.

Major Milestones		Outcome	Status
✓	Establish Governance Policies	Established by Council, these policies enable Council to provide governance in an efficient and accountable manner. They establish how Council operates and behaves—describing its own job, its internal workings, its connection and relationship with its citizens, and the CAO.	★
✓	Create Executive Limitation Policies	<ul style="list-style-type: none"> Established by Council, these identify the actions and decisions the CAO may not do (because those actions may be illegal, unethical, imprudent or unacceptable for other reasons), even if the action may be effective in achieving its purpose. By defining what is unacceptable, these types of policies avoid telling the CAO how to manage. 	★
✓	Create Council to Management Delegation Policies	Established to guide the manner in which Council provides governance to management (through the CAO or designated authorities).	★
✓	Develop Purpose Statements	Established to communicate the fundamental reasons the organization exists by identifying the benefit the organization should produce, for whom, and at what cost/worth.	★
✓	Finalize approval of the Council Governance Framework	The finalized framework allows Council to: <ul style="list-style-type: none"> Focus on the larger issues; Delegate with clarity and control management's job, without crossing from a governance role to a management one; Rigorously evaluate the accomplishment of the organization and; Concentrate on leading the organization. 	★

Learn more: www.okotoks.ca/council-policies

Strategic Directions

The remaining pages in this final report summarize all the initiatives and key result areas for the 7 strategic directions of Council over the last 4-year Council Term.





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

Status

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.



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

Foster Economic Vitality

The Town of Okotoks will facilitate a healthy economy where quality jobs and business opportunities are abundant.

Key result areas & initiatives

Status

Contribute to an environment necessary for the business community to grow at a rate that is faster than residential growth.

-  Determine what is most important for economic development success for Okotoks as a whole and adjust systems and actions to achieve the new direction.
-  Determine the most appropriate economic development model for success, including partnerships with other economic providers (public, non-profit and private) and clarify roles and responsibilities for each partner to leverage opportunities.
-  Align education, labour force, business, environment, innovation and technology, recreation and entertainment, health and social initiatives to achieve economic success.
-  Capitalize on regional opportunities to strengthen the local/regional economic vibrancy, enabling the Foothills region to be more economically self-sufficient.








Improve the ease of doing business in the Town of Okotoks by progressive policies, demonstrating a can-do attitude with alternative solutions and streamlined processes.

-  Complete two comprehensive system and process reviews per year, prioritized by the largest potential impact and including both customer input and industry best practices.
-  Review, adjust and streamline the processes required to facilitate alignment with the new Municipal Development Plan and Land Use Bylaw, making it easier for businesses to locate in Okotoks and ultimately attract more investment.



The downtown is a destination used by a wide range of people and for an increasing range of activities.

-  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 2023 Alberta Summer Games, should they be awarded to the Town, including engaging businesses and residents to showcase our community.



★ Complete

● On track

● Off target

▲ In progress

■ Future initiative

Manage Community Growth

The Town of Okotoks will build a complete community that provides economic, social, and environmental sustainability for people to live work and play.

Key result areas & initiatives

Status

Provide new innovative neighbourhoods that embrace complete neighbourhood design, including diversified housing options for all lifestyles at all stages of life.

- ➡ Ensure the Municipal Development Plan (MDP) is innovative and reflective of strategic priorities.
- ➡ Offer new affordable housing options.
- ➡ Pilot innovative development on underutilized sites.
- ➡ Complete neighbourhood principles are modelled within a new development.
- ➡ Create a fiscal impact analysis framework to evaluate the costs of all forms of development.



Provide a variety of mobility options including active transportation and local transit that meet citizen's needs.

- ➡ Implement the outstanding short term Active Transportation Plan recommendations to improve connectivity and access.
- ➡ Align the mobility options currently under development in the Environmental Master Plan (EMP), Climate Change Action Plan (CCAP), and Active Transportation Plan (ATP) with the MDP.
- ➡ Develop and implement a local transit strategy that is accessible while considering evolving technologies and their impact on traditional transit delivery models; monitor and adjust.
- ➡ Explore linkages of local and regional transit and pathways to provide multi-modal transportation options within the region.



Okotoks has distinctive character and identity that is identified in our built form.

- ➡ Complete and implement the Municipal Heritage Designation initiative.
- ➡ Ensure the MDP captures a distinctive character and identity for Okotoks.
- ➡ Ensure that the Culture, Arts & Heritage Master Plan and the MDP are aligned.
- ➡ Develop a Trails Master Plan and implement prioritized strategies.
- ➡ Align all master plans with the annexed area.
- ➡ Develop a distinct character for Downtown while also protecting its heritage.
- ➡ Incorporate a distinct character into several new and re-purposed developments.



★ Complete

● On track

▲ In progress

● Off target

■ Future initiative

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

Status

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.



On track
 Off target
 Complete
 In progress
 Future initiative

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

Status

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.



★ Complete

● On track

▲ In progress

● Off target

■ Future initiative



COVID-19 Safety Check-in Process at Okotoks Recreation Centre




Strengthen Healthy and Safe Community

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

Key result areas & initiatives




Status

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






-  Evaluate progress towards the community Social Wellness Framework to identify successes and gaps and adjust actions accordingly.
-  Create opportunities for community members to actively participate in their community, to enhance governance, safety, social connections and overall health and wellness.
-  Strengthen our emergency management by updating our Emergency Management Plan, Flood Action Plan, and Business Continuity Plan to ensure the Town is adequately prepared to respond.

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Develop strategies to incorporate the legalization of cannabis into Okotoks' policies and practices to ensure a continued healthy and safe community.

-  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.

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 On track
  Off target
 Complete
  In progress
  Future initiative

Enhance Organizational Excellence

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

Key result areas & initiatives

Status

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 multi-year 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.



Continue to expand strategic conversations between Council, Administration and the community to ensure we continue to work together to advance the quality of life for all.

- ➡ 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.
- ➡ 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 and publish performance measures for core services.



★ Complete

● On track

▲ In progress

● Off target

■ Future initiative



Council is responsible for establishing the strategic direction of the organization. Administration is responsible for implementing that direction and achieving the result required by Council for the community. By working together to identify and achieve results, we ensure the continued delivery of core services to the organization and enhancements to our strategic directions.

The only way to know if we are on track, is to assess our performance, monitor and adjust to respond to the everchanging conditions. This report highlights what we've done and tries in an easy and transparent way to report out to the community on the progress that has or has not been made and the impacts that has had on the community. This report covers the 2018 to 2021 term of Council and highlights the strategic directions and progress they wanted for the community. We will enter a new cycle in 2021 after the October 18th election.

I encourage you to review and think about the changes you want to see in your community in the future. Share those thoughts and ideas to make sure Okotoks reflects the needs of its residents and businesses. We will be looking for your input as we develop the next strategic plan.

I would like to thank Council for providing this direction to Administration, and for all of the hard work Administration has done make Okotoks better.

Deputy Mayor and CAO



supporting the
2018-2021

STRATEGIC PLAN

growing up from strong roots