



# Council Orientation (Part 2)

## 2022 – 2026

### Major Strategic Directions Workshop

January 12, 2023

# Council Orientation

Purpose:

- To provide Council a big picture overview of the major major strategic directions and issues affecting Haldimand

# Growth Management

# Addressing Growth Challenges

Key questions explored/addressed:

- How do we **financially** plan for the needs?
- What are the **operational** impacts from growth?
- What are the impacts on future municipal **infrastructure**?
- What will be the **customer service** expectations — how might they evolve?
- How do we plan for **diversification** of resident needs and wants?
- What are our **core services** — and how do we stay really good at delivering them?

# The Compelling Case for Action – the why?

- Population growth is not a blip – steadily rising and pace is sustainable (to a point - not infinite);
- Must plan for, execute on and fund significant infrastructure and facility demands
  - we are in the midst of significant growth and we don't have a comprehensive plan to meet the full range of infrastructure needs
- Forecast growth has major implications for future budgets, staffing and service level provision
- Disconnect between timing of additional revenues and the costs for implementing infrastructure and operating impacts
- Growth is leading to greater diversity

# Key Factors in Growth Management

1. Population & Employment Forecasts / Distribution / Land Supply
2. Planning for Infrastructure
3. Financial Planning & Funding Growth

# **Population & Employment Forecasts / Distribution / Land Supply**

# Provincial Context

- Haldimand is in the outer ring of the Greater Golden Horseshoe (GGH) Growth Plan Area
- GGH represents 26% of Canada's population and is expected to grow to 15 million people and 7 million jobs by 2051
- GGH is one of most dynamic and fast-growing regions in North America
- GGH has one of the world's most vibrant and diverse economies
- GGH generates 25% of Canada's Gross Domestic Product



# Growth Plan for the GGH

## Plan for growth by:

- Avoiding agricultural land, resource areas and significant environmental features
- Avoiding hazard lands
- Efficient use of land – increase densities
- Efficient use of infrastructure
- Intensifying in existing built areas
- Maintaining housing affordability
- Maintaining heritage and culture
- Creating complete communities

# Provincial Growth Requirements for Haldimand

**The County, through its Official Plan, must:**

- Accommodate Provincial 2051 forecast of **77,000 residents** and **29,000 jobs**

*Implication?* Over the next 30 years we must accommodate an additional ...

- **30,000 new residents,**
- **12,700 new households, and**
- **11,000 new jobs**

# Population Growth

- Future population growth (to 2051) will be **focused on urban areas**, with the majority in designated greenfield (undeveloped urban areas)
- Distribution of population is forecast as follows:

Community	Net population increase (to 2051)	% of County population growth
Caledonia	20,100	67%
Cayuga	1,800	6%
Dunnville	2,100	7%
Hagersville	5,100	17%
Jarvis	800	3%
Townsend	300	1%

84%

# Employment Growth

- Employment growth will be focused on **urban areas** - 78%
  - About 60% of **urban job growth** is anticipated to be in community type jobs: retail, service, education, health care, recreation, institutional sectors; remaining 40% will be in manufacturing, processing and logistics
- **Rural areas** will also have job growth – remaining 22%

# Employment Growth

- **Employment growth distribution** anticipated as follows:

Community	Net job growth (to 2051)	% of total employment growth
Caledonia	5,564	65%
Cayuga	770	9%
Dunnville	1,284	15%
Hagersville	770	9%
Jarvis	257	3%
Townsend	0	0%
Rural	2,410	22%

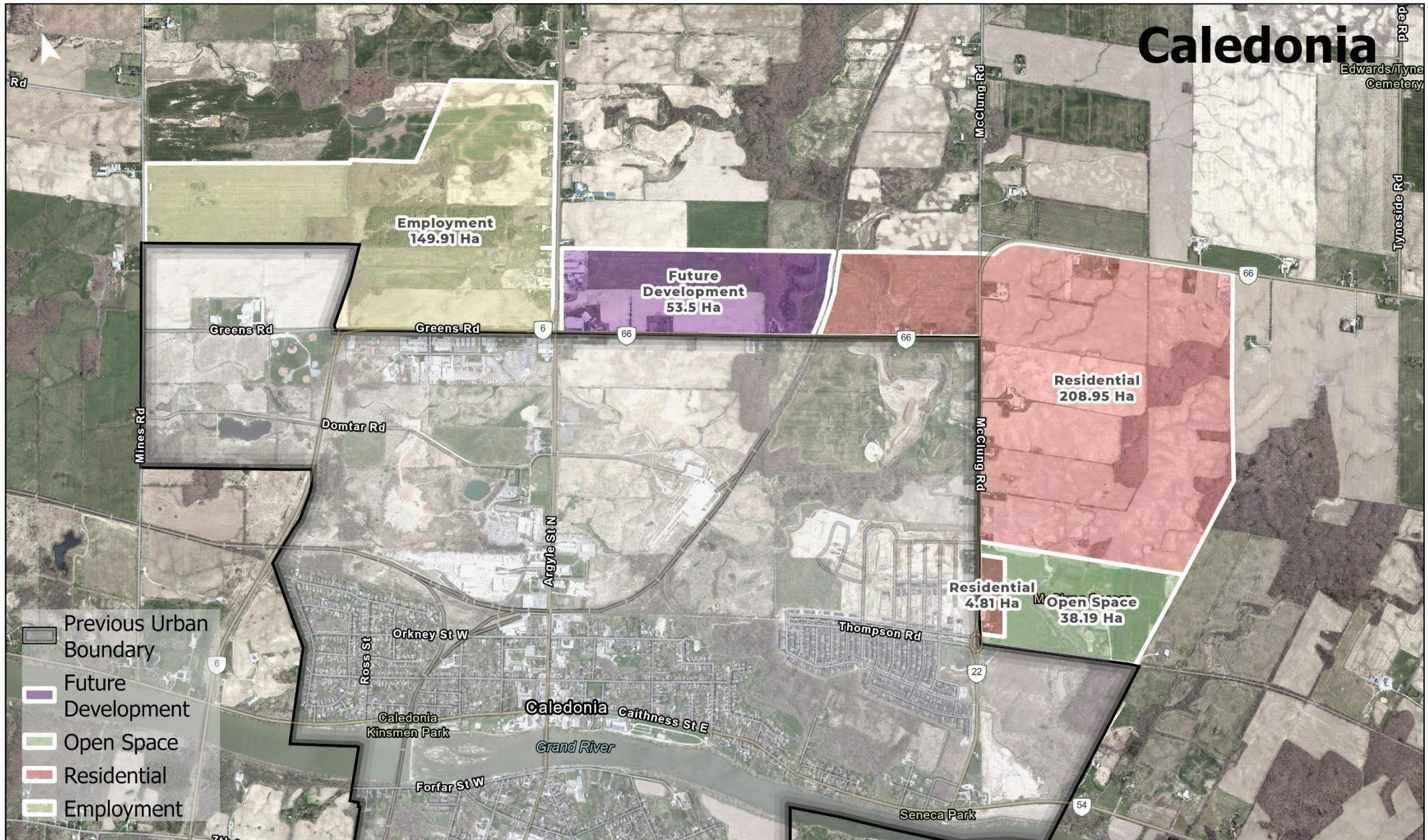
80%

# Growth Strategy & Official Plan

- County's 30 year Growth Strategy (Strategy) and Official Plan (OP) Update - Phase 1 were **approved by Ministry of Municipal Affairs & Housing** in November 2021
- Strategy and OP respond to Provincial direction and population / household / employment allocations through **policies and mapped land supply**
  - Sufficient (30 year) supply of land with the right designations, in the right places, with servicing capabilities and minimal constraints (e.g. floodplains)
- The Strategy and OP inform the other key factors in growth management – **infrastructure planning and financial planning**

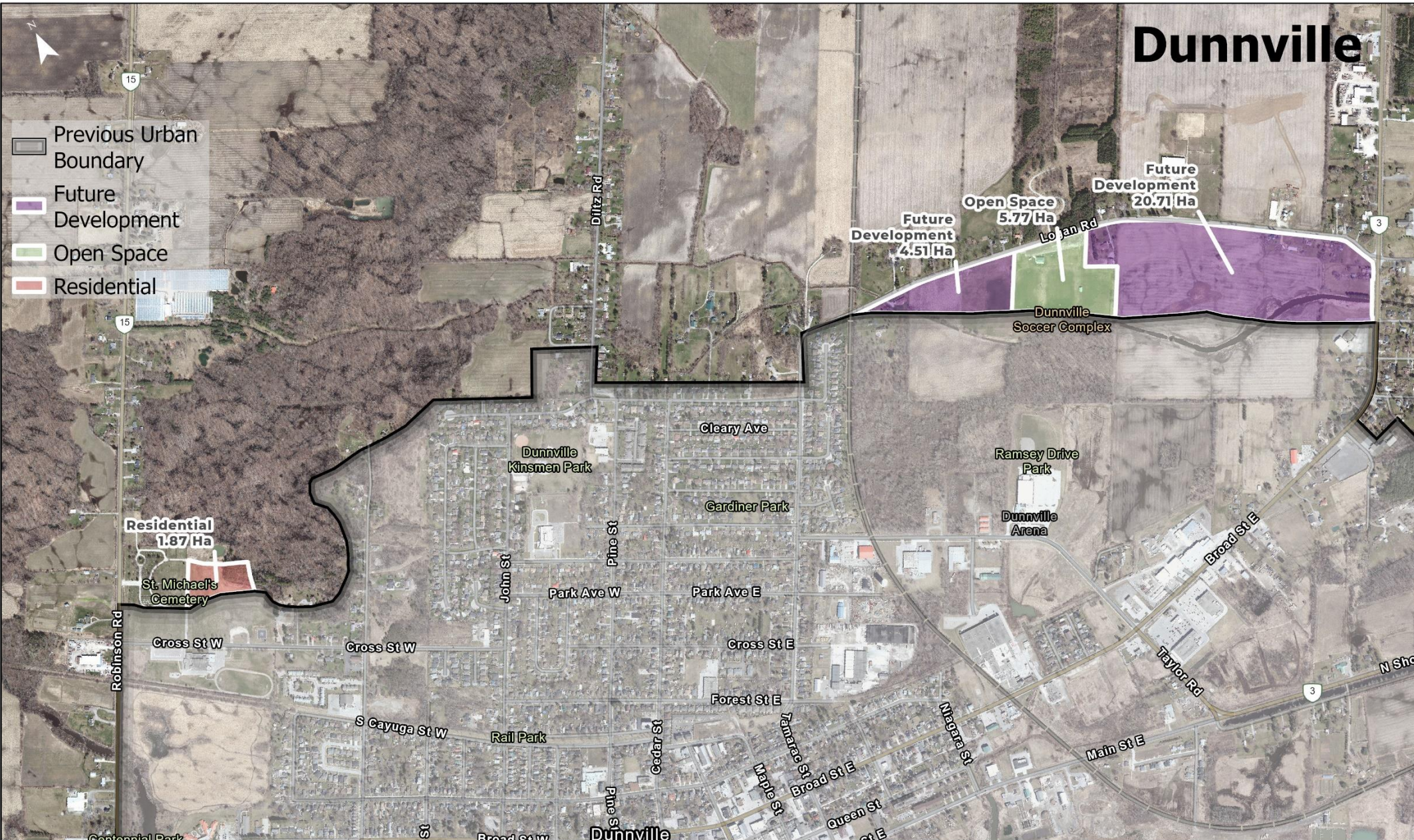


# Caledonia

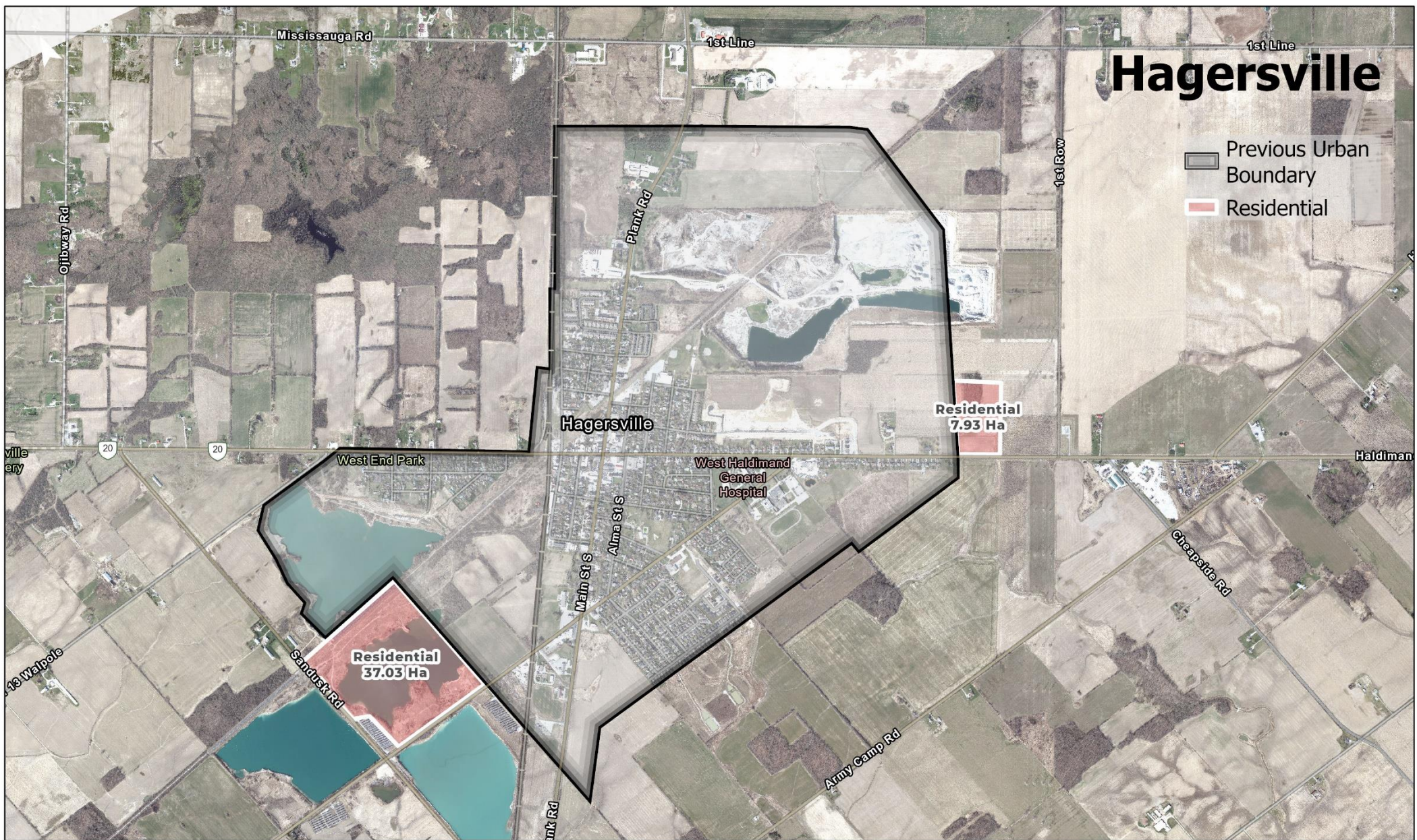




# Dunnville









# Planning for Infrastructure

# Asset Management

- Ontario Regulation 588/17 Asset Management Planning for Municipal Infrastructure.
- Asset management enables the County to maximize benefits and mitigate risk for our infrastructure assets in order to provide acceptable and sustainable levels of service to its community.
- County's 2022 Asset Management Plan (AM Plan) summarizes the current state of infrastructure assets, current levels of service and associated lifecycle costs.
- 2022 AM Plan indicates an infrastructure replacement value of \$3.3 billion.
- 2025 AM Plan will include proposed levels of service with required activities and the financial strategy to fund the activities.

# Master Servicing Plans

- The objective of a **Master Servicing Plan (MSP)** is to provide a comprehensive plan that incorporates all facets of the management, expansion and funding of the **water, wastewater, transportation and stormwater systems** for a specific urban area
- Each MSP is ‘forward looking’ and contains strategies for a **20 year period** that align with growth forecasts and land supply contained in the County’s Official Plan
- Each urban area of the County (Caledonia, Cayuga, Dunnville, Hagersville, Jarvis, Townsend) has a comprehensive MSP which is **updated every 5 years** to account for any significant changes in development conditions, infrastructure, etc.

# Significant Servicing Considerations to Accommodate Growth

Significant planning and decision making will be required over the next 4 years for the following:

- Caledonia:
  - Wastewater treatment:
    - new plant construction is required to accommodate growth
    - land for new plant to be secured in 2023
    - planning and design work (Environmental Assessment – ‘EA’) to be completed in Fall 2023
    - Capital budget contains \$53M for land, EA process and construction
  - Water supply:
    - Consideration of Nanticoke supply versus current Hamilton supply
    - Upgrades to storage and supply infrastructure 2023/25
- Hagersville:
  - Wastewater treatment:
    - Hagersville Master Servicing Plan to be completed in 2023 – will provide roadmap for wastewater treatment capacity
  - Water supply:
    - Nanticoke Water Treatment Plant Expansion EA – completion Spring 2023
    - Highway 6 transmission line twinning 2023/24
    - Local watermain upgrades 2025

# Major Construction Expected This Term of Council

- Caledonia Nairne Street Grand River Crossing – 2023
- Caledonia Fire & EMS Station – 2023/24
- Thorburn Street Reconstruction – 2023
- Granular Road Conversion – Completion 2023 with final top coat 2025
- Nanticoke Industrial Pump Station Upgrades and Imperial Oil Transmission Main – 2023/24
- Hagersville Active Living Centre and Library – 2024/25
- Nanticoke Water Treatment Plant Expansion – 2024/25
- Highway 6/Road 66 Intersection Upgrades (MTO) – 2025
- Caledonia Water Storage Improvements – 2025/26
- Caledonia Wastewater Treatment Plant – 2025/27
- New Roads Works Facility/Yard – 2026
- Cayuga Skate Park/Tennis Courts – 2026
- Dunnville Fire & EMS Station – 2026/27
- Argyle Street Grand River Bridge Replacement (MTO) – TBD

# Funding Growth

# How is growth funded?

## Development Charges:

- Development charges are one-time fees **imposed by on land developers**, home builders and institutions when they develop or build upon an area of land.
- The fees are intended to **offset the capital costs of increased municipal services and infrastructure** required due to population growth within the municipality, resulting from new development.
- The municipality can use development charges to pay for **‘hard services’** such as water, sanitary, waste management or roads, and **‘soft services’** such as recreation centres, libraries or parks.
- Development charges apply to **residential, commercial, industrial and institutional** development
- Development charges are collected and used on the principle of **‘growth pays for growth’**



# How is growth funded?

## Parkland dedication:

- Planning Act tool that allows the County to harness growth by requiring **developers to contribute** to the expansion and enhancement of the County's parks, trails and open space system, ensuring it grows along with the community
- As **part of the municipal approval process** for land development, redevelopment, subdivision, consent and site plan applications, the County can require developers to:
  - **contribute land** to the County for parks purposes; and/or
  - **provide cash-in-lieu of parkland** ('parks levy') in instances where there may be limited opportunity within a development to provide land for parkland, and instead a sum is paid to the County to be used towards park development elsewhere
- County can obtain land or cash-in-lieu of land from **residential, industrial, commercial** and **institutional** development

# Bill 109/23

- Immediate Implications

- Capping of annual indexing of current rates
- Eliminate ability to fund Development related studies from DC charges
- Certain growth related land purchases ineligible for DCs
- Phase in on any new rates over 5 years
- Increase Service level standards from 10 years to 15 years
- Annual spending requirements for Dc receipts

- Future/Potential Implications:

- Refund of permit fees under certain circumstances (effective July 1, 2023)
- DC exemptions for Affordable & Attainable housing (currently deferred)
- Removes Affordable Housing as DC eligible

# Potential Near-Term Directions/Initiatives

- **High priority:** (*based on impact, ease of implementation, or foundational item*)
  - Complete inventory of what key pieces we have in place / still require; and ensure completion of same – Community Recreation and Facility Study; Master Servicing Plans; Trails Master Plan Update; Parks & Rec Master Plan, Asset Management Plans (Core / Non-core)
  - Develop a long term financial plan (capital and operating impacts)
- **Other:**
  - Implement/Evaluate Affordable Housing initiatives
  - Establishing Service Delivery standards (i.e. tied to Asset Management Plans)

# **Long Term Financial Principles/Strategy**

# 3 Pillars of Financial Planning



# 3 Key Principles Related to Long Term Financial Plans

- *Long term capital spending and related financing plan*
- *Investment Plan – maximize returns and minimize risk*
- *Maintain flexibility and contingency planning for unforeseen events*

# Specific Principles Adopted by Council

## – Sustainability

- ***Financing Principles to ensure affordability of services:***
  - *Target Tax/Rate Increases:* Council has established a tax rate increase for term of Council (rate increases viewed in relation to year over year impacts)
  - *Dedicated Capital Levy:* Overall levy/rate increase of 1% annually for capital related expenditures (target tax supported capital related expenditures of 35%)
  - *Capital Reserve/Reserve Fund Principles:* Specific to dedicated capital related replacement reserves (“Pay as You Go” principle):
    - Council has established dedicated reserves to fund specific capital replacement programs
    - All reserves must have a positive balance at end of 10 year forecast; and
    - Any interim financing must be limited to 25% of annual contributions; and
    - All Financing charges must be recovered through the underlying applicable project

# Impacts on Long Term Financial Plan

- Municipal Discretion
  - New/enhanced services or projects
  - Increases/changes to service delivery or project scope
  - Accelerating timing of planned projects
  - Deviating from underlying warrants/principles (inconsistent with current standards)
- External Impacts
  - Legislative changes impacting service delivery/scope
  - Reduced Provincial/Federal transfers
  - Change in “customer” service needs
  - Changes in local business operations
  - Climate change





# Budget Drivers & Inflation

- Anticipated budget drivers for 2023 and beyond:
  - Inflation impacts: wages, goods and services and capital cost escalations
  - Supply chain issues: Ability to procure, delivery delays and supply impacts on costs
  - Fuel Impacts: Fuel dependent contractual impacts (i.e. solid waste collection, winter control, hauling related contracts
  - Insurance increases: Impacts on the County's premiums (higher deductibles, lower coverage, higher premiums) as well as contractual arrangements
  - Increased debt borrowing costs: Impacts ability to take on additional debt and limits capital related spending
  - Provincial downloaded costs through various legislative changes: Changes to Planning Act, Conservation Authorities and Development Charges have potential for long term financial impacts

# Investment Strategy

- **Key Principles of Investment Policy:**

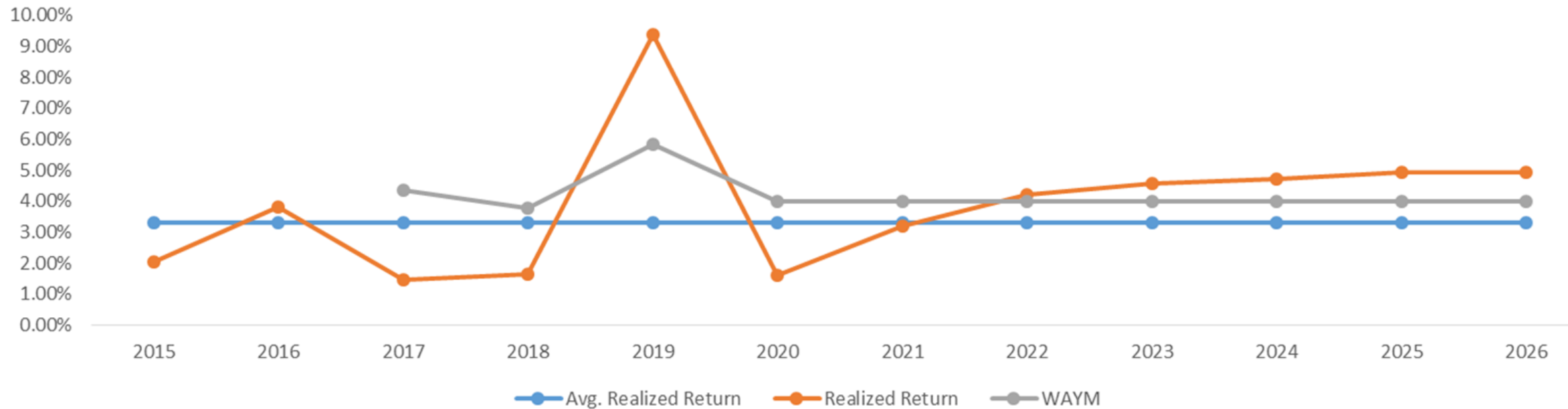
- *Preservation of capital*
- *Maximize investment returns*
- *Minimize risk*
- Investment Committee to review/meet policy & principles
- Use of External Investment Manager (*since 2016*)
- Portfolio diversification
- Optimize utilization of cash resources

- **Uses of Investment Returns:**

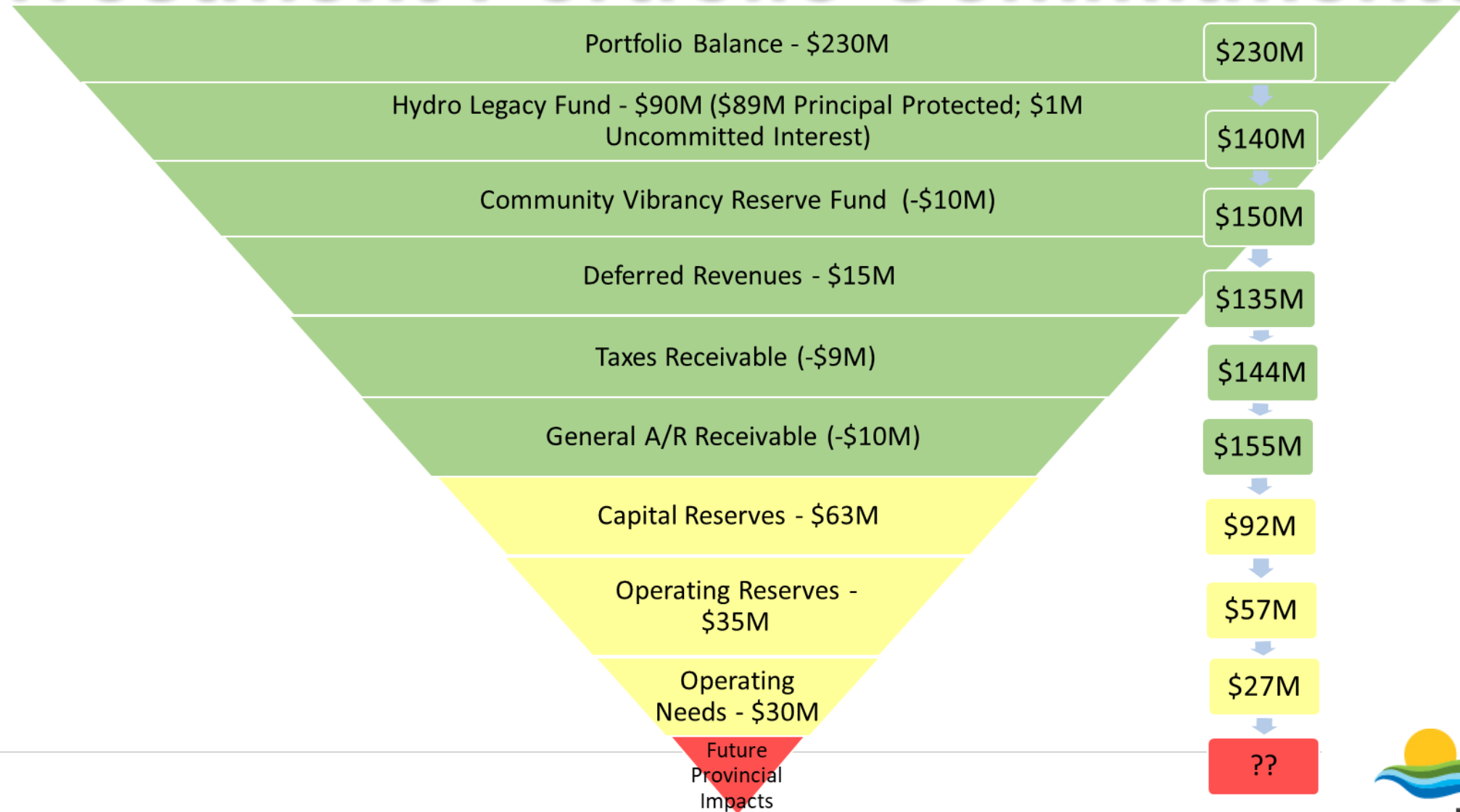
- Hydro Legacy Fund: Key goals
  - Preserve and protect principal – includes indexing principal
  - Current target of 4% annual returns
  - Use of uncommitted investment earnings – major assets/infrastructure needs
- Tax supported operations: Annual offset to required tax levy of \$1.6 million or approx. 2%
- Reserves/Reserve Funds: statutory and Council approved
  - Used to fund long term capital plan
  - Offset required annual contributions

# Investment Fluctuations

Realized Returns Vs. Weighted Average Yield to Maturity (WAYM)



# Investment Portfolio Commitments



# Hydro Legacy Fund

- In March/April of 2018, Council established the Hydro Legacy Fund policy.
- Establishes roles and responsibilities with regards to governing and managing the Hydro Legacy Fund.
- The policy requires the preservation and protection of the net proceeds of the sale of Haldimand County Hydro.
- Recommendation by Council in 2022 to revisit policy wrt Principle Protection and annual indexing methodology – requires public meeting

# Hydro Legacy Fund

- Main components of policy:
  - Governance and Management;
  - Litigation Allowance;
  - Investment Strategy and Earnings Approach;
  - Use of Investment Earnings;
  - Reporting Requirements
- Investment Strategy and Earnings Approach
- Use of Investment Earnings

# Hydro Legacy Fund

Current Fund Balance (as at December 31, 2021)

Hydro Legacy Fund Balance	2019 (\$)	2020 (\$)	2021 (\$)
Ending Principal Protected Balance	\$72,149,000	\$73,783,000	\$82,348,000
Ending Litigation Allowance	\$6,845,000	\$6,845,000	\$6,845,000
Ending Uncommitted Interest Earnings Balance	\$4,984,000	\$5,959,000	\$857,000
<b>Total Hydro Legacy Fund Balance</b>	<b>\$83,978,000</b>	<b>\$86,587,000</b>	<b>\$90,050,000</b>

# Community Vibrancy Fund

Community Vibrancy Fund Balance	2022 NPV (\$)
Ward 1	\$784,058
Ward 2	\$1,211,668
Ward 4	\$12,013
Ward 5	\$3,584,954
<b>Total Fund Balance</b>	<b>\$5,592,693</b>



# Council Orientation – Key Administrative Challenges Going Forward

# Long List of Emerging Issues

- Talent Attraction/Retention — getting and keeping good staff
- Succession Planning
- Indigenous Reconciliation
- Service Delivery — cohesive and consistent practices, new services and how delivered
- Responding to Climate Change and Going Green
- Managing Growth from a Fiscal Perspective
- Transitioning from a small to mid-sized community
- Technology and Smarter Communities

# Long List of Emerging Issues continued

- Health and Social Services Governance
- Affordable Housing and County's role
- Enhancing community vibrancy including waterfront
- Public health, safety and wellness and County role (i.e. physician recruitment, public mobility)
- Managing and operating in an environment of constant change
- Meeting needs of an increasingly diverse community
- Providing staff the skills necessary for success

# Prioritizing the Long List....

In identifying the priorities, consideration was given to the degree to which the topic...

1. Is 'mission critical' to the success of the County in the coming years (speaks to a pressing or immediate/near-term need)
2. Is substantively within the County's sphere of control (or, at least, significant influence)
3. Would allow for near-term, relatively implementable actions that would make a difference
4. Is aligned with Council's strategic focus and public official interests
5. Addresses important issues of resident service and speaks to enhancing quality of life in the County
6. Is staff supportive, corporate culture strengthening and organizationally impactful
7. Mitigates risks that would be in play given inaction

# Short List of Priority Issues...

## **Internal Focused:**

- Talent Attraction/Retention of Staff
- Succession Planning
- Key Staff Skills for Future Success
- Service Delivery Improvements

## **External Focused:**

- Addressing Growth Challenges
- County Role in Addressing Social Issues
- Climate Change / Environmental

# Talent Attraction/Retention

# Topic: Talent Attraction/Retention

## Key questions explored/addressed:

- How do we attract/keep the best people?
- How do we grow from within?
- How do we best attract the next generation of employees?
- In what ways do we need to change our current processes — which are helping/which aren't?
- How do we ensure the right work-life balance?
- Are there proactive/aggressive steps that need to be taken? (e.g. employee supports for housing, etc.) — that go beyond traditional approaches?

# Key Context

The following facts/trends/assumptions have shaped our thinking:

- ❖ Growing difficulty in filling positions (especially technical and mid-level positions) and expectation that this will continue
- ❖ It is currently an “employee market”; i.e. “what are you going to do for me?”
- ❖ There is a shift in generational expectations / trends – not looking for a lifelong employment relationship; immediate gratification; flexible working options; flexible benefit options; promotion opportunities
- ❖ Desire to hire for fit and not just expertise
  - ❖ Hiring practices to introduce psychological capital; core competencies
  - ❖ Overlap with **Topic: Key Staff Skills for Future Success**, and **Succession Planning**
- ❖ Desire to be an Employer of Choice, with exceptional staff / top talent



# Talent Attraction/Retention: **Attracting**

- Competitive Wages & Benefits
  - Compensation Review / Comparable – including strategy for HC
  - Being responsive with Benefit changes (flexibility, targeted to our demographics)
- Marketability of Job Postings
  - Opportunity to sell Haldimand County as a brand; what can we do for you? – Net Better Off
- Flexible Working Options for Staff
  - Remote working, flexible hours, on the job training, other?
- Passive to Targeted Advertising (and everything in between)
  - Marketing our County – i.e. good place to live, affordable Cost of Living, “real.potential”
  - Exposure to working for County (what jobs look like, what services provided, community engagement i.e. day in the life)
  - Marketing of positions generally (partnering with education system, job fairs, information sessions, published profiles, employment landing page)
  - Targeted Marketing of vacancies (utilizing social media better, creative recruitment strategies, etc.)

# Talent Attraction/Retention: **Recruiting**

- Hiring for Fit
  - Develop key skills / corporate competencies and testing measures
  - Hiring for psychological capital
- Improved Recruitment Process
  - Re-establish a start-to-end process; not just an interview – flexible options for assessing candidates (i.e. written testing, job simulation, feedback for fit, personality)
  - Considerations of when to engage a 3<sup>rd</sup> party
  - Role of hiring manager versus HR – need to reconfirm or realign - consistency
  - Use of technology in the process
  - Recognizing the volume of work, any process improvement needs to be achievable
- Corporate Orientation
  - Opportunity to reinforce concepts outlined through a corporate orientation process
  - Continue to “market” towards new hires, walk the walk and follow up

# Talent Attraction/Retention: **Retaining**

- Regular and Routine 1:1 Discussions with supervisor – make commitments and focus on support
  - Ongoing communication and engagement – opportunity for more effective process (e.g. 15Five)
  - Career goals – development path, versus mentor, versus train or contribute
  - Performance Feedback – no surprises
- Develop a Mentorship/Coaching process
  - Cross divisional, encouragement of growth and corporate success. Break down silos
- Training & Development
  - Maintain Leadership Development streams, including for “up and coming”
  - Conduct Corporate “Needs Analysis” and draft a 5 year training plan (e.g. resiliency, customer service, technology based skills)
  - Offer a of variety of corporate training platforms (classroom, virtual, written, informal, on demand, libraries)
  - Mandatory versus discretionary training opportunities
  - Expectations of involvement in professional associations
- Focus on Corporate Solutions as a Retention Tool
  - Up to date technology solutions
  - Best practices and celebration of innovation
  - Constant development and improvements

# Potential Near-Term Directions/Initiatives

## High priority: *(based on impact, ease of implementation, or foundational item)*

- ❖ Refresh our job postings – focus on branding/marketability
- ❖ Refresh our job descriptions – align with our identified key skills and competencies
- ❖ Outsource a compensation review (start with Non-Union)
- ❖ Recruitment Process/Policy review through facilitated leadership team meeting (3<sup>rd</sup> party recruitment specialist)

## Other:

- ❖ Establish a Training / Development Calendar based on needs and discretionary offering
- ❖ Passive Advertising/Marketing/Exposure of what it is like to work for Haldimand County (see previous slide for recommended action items)
- ❖ Establish and Implement a Corporate Orientation program
- ❖ Develop a Mentorship / Coaching Program (cross referenced with Succession Planning and Key Skills priorities)
- ❖ Social activities (with families)

# Succession Planning Presentation

# Topic: Succession Planning

## Key questions explored / addressed:

- Why is this critical now — what will happen if we're not successful?
- What are we doing internally to provide career support and knowledge transfer?
- Who can / might retire in the near future?
- How do we grow from within?
- How might we best manage an impatient workforce that may not want to wait to move up — how do we create stepping stones for people?

# ***The Compelling Case for Action – the why?***

- ❖ **The following points emphasize the need for County action:**
  - Continuity of corporate knowledge and community experience is key to the success of the municipality.
  - Ontario's aging population coupled with the 'Great Resignation' will / has created more employment opportunities than qualified candidates.
  - Critical liabilities in all areas with a lack of succession planning
  - Proper succession planning should improve interest in the organization and overall morale.

# ***Why is this critical now?***

- There are 30 staff members eligible for retirement in 2022 and 83 over next 5 years.
- Fact, Canada is experiencing '[The Great Resignation](#)' due to an aging workforce as baby boomers and generation X move into their retirement years.
- To be successful, we need to develop strategies to aid staff retention in order to compete against a highly competitive labour market by creating a positive work culture and keeping up-to-date with employment trends for the next generation of employees.
- Succession planning is crucial for all organizations in order to maintain stability with operations and, for the well-being of staff and morale.



# ***What are we currently doing internally to provide career support and knowledge transfer?***

- Memberships to professional organizations provide opportunities to enhance skills and / or education.
- Online personal development program for staff.
- Leadership Development Instructor Lead Program for management– generally in person.
- Executive Development stream via Schulich
- Opportunities for Assignment to a Higher Paying Classification during extended staff absence(s) which promotes incremental knowledge transfer and recognition.
- Without a corporate-wide succession planning framework, departments / divisions have created an 'ad-hoc' approach to succession planning.
- Our EFAP (Homewood Health) have a free Life Smart Coach to help staff with life/work balance, conflict resolution/support and guidance to help coach staff for advancing their careers.
- Consideration for a pool of mentors to be offered to new employees.

# ***Who can / might retire in the near future?***

- There are 65 staff members eligible for retirement between now and 2026.
- 14 (21.5%) are in leadership positions (from Supervisors to SMT).
- The numbers for eligible retirees
  - 2021/22 = 30
  - 2023 = 12
  - 2024 = 12
  - 2025 = 11

# ***Potential Near-Term Directions / Initiatives***

- ❖ **High priority:** *(based on impact, ease of implementation, or foundational item)*
  - Identify key positions whose current incumbent is eligible for retirement and whether an 'ad-hoc' succession plan is already in place.
  - Create a job talent profile for a successor.
  - Establish an informal mentorship program to provide staff with additional support and guidance.
  - Supervisors and managers to establish regular one-on-ones with potential candidates to ensure all resources are available for staff advancement.

❖ **Other:**

- Identify and fast-track staff who demonstrate potential for career advancement across a diverse skills work base.
- Look at opportunities for advancement in movement across departments and divisions.
- Look for opportunities on special projects and committees to enhance corporate knowledge, political acuity and job satisfaction.
- Ensure the training programs are meeting our objectives and that staff are fully utilizing the opportunity.

# **Key Staff Skills for Future Success**

# Topic: Key Staff Skills for Future Success

Key questions explored/addressed:

- ❖ What are the key staff/skills and competencies we need to be successful?
- ❖ How to do we build resiliency, adaption and change management into our organization and its culture?
- ❖ How do we build a 'learning organization'?



# Key Context

- ❖ The following facts/trends/assumptions have shaped our thinking:
  - ❖ Change is constant and the pace is increasing requiring the ability to rapidly respond, adapt and adopt new ways of work including more remote work
  - ❖ The County is facing changing demographics that will significantly influence services, how they are delivered including the use of technology
  - ❖ The issues the County is facing are becoming more complex and inter-related requiring cross-functional inputs and collaborative solutions
  - ❖ There will be increased expectations high quality customer service
  - ❖ While technical skills will remain important, transferable 'soft social skills' around problem-solving, self-management/growth, working with people, leadership and technology will become more important.
  - ❖ There is true buy-in in our hiring practices to focus on finding/growing great leaders throughout the organization to maintain and enhance our workplace culture.

# The Compelling Case for Action – the why?

- ❖ The following points emphasize the need for County action:
  - ❖ To be able to ensure local government continues to meet the needs of citizen's and contributes to a high quality of life and economic growth – essentially to maintain the relevance of local government
  - ❖ To mitigate risk – without proper skills there will be errors that could have significant financial and reputational impacts
  - ❖ Without these skills there will be staff morale issues, recruitment issues and Council-Staff relationship issues due to declining trust and respect

# Key Skills Required: - Problem-Solving

- **Critical thinking** – analytical and strategic thinking
  - Correctly defining a problem, gathering information, thoughtful questions, analysis of multiple options/alternative correct solutions, logical conclusion
  - Proactively looking to future and options of how to get there –
  - Systems thinking – aware of connected and inter-related parts/dependencies
- **Innovation, creativity and originality**
  - Techniques to generate new ideas and ability to apply learnings to County context
- **Reasoning** – identifying implications of a particular decision/direction, selection of 'best' option, measures to reduce negative consequences

# Key Skills Required: - Self-Management

- **Active learning –**
  - Actively seek new knowledge, build/grow skills, take on challenges, learn from mistakes, interest in current affairs
- **Resilience –**
  - Coping with crisis, the ability to recover from stress, perseverance and a positive approach to change/uncertainty
  - The ability to navigate disruption, steer through rapid transformation
- **Cognitive flexibility-**
  - Ability to think about multiple concepts simultaneously – multi-task
  - Changing behaviour to different environments/ unusual situations
  - Agility to respond to change

# Key Skills Required: - Self-Management

- **Self Direction-**

- Organized
- Time Management Skills
- Goal Orientation

- **Initiative**

- The drive to identify and make improvements

- **Project Management**

- Deliberative approach to pre-planning and managing work

# Key Skills Required: - Working with People

- **Inter-personal communication**

- Ability to exchange information – clear communication, right tone, body language
- Active listening
- Empathy and genuine interest in building connections
- The ability to influence others through reasoned argument

- **Emotional intelligence**

- Self-awareness of impact on others, ability to connect with others, self-reflection, the ability to manage emotions, feelings and actions at work – modifying behaviour



# Key Skills Required: - Working with People

- **Collaborative skills** — ability to work across functions
  - Facilitation, interest based negotiation, team orientation
  - Dependability
  - Persuasion
- **Diversity and Cultural Intelligence**
  - Understand that others view the world differently – cultural literacy
  - Skills to understand, respect and work with others of different background
  - Promoting, embracing and facilitating diversity, equity and inclusion
- **Service Orientation**
  - Actively looking at ways to help people, anticipating needs, thinking like an end user

# Key Skills Required: - Technology

- **Technology Use**

- Understanding the impact / opportunities of new technologies
- Use of technology for process improvement and regular/routine functions to allow staff to focus on value-added work
- Awareness of the need to use technology appropriately (security issues, proper communications)

- **Digital literacy**

- Understanding terminology and application of social networks

# Key Skills Required: - Public Service Values Based Leadership

- Public Sector Focus – service above self
- Political Acuity
- Community based focus – partnerships, consultation, outreach
- Ethical responsibility – say and do the right things
- Ability to motivate and inspire – vision, communication, empathy, compassion, teaching, coaching, mentoring
- Flexibility / Adaptability
- Fostering trust and mutual respect
- Entrepreneurial

# Potential Near-Term Directions/Initiatives

- ❖ **High priority:** *(based on impact, ease of implementation, or foundational item)*
  - ❖ Prioritize soft skills through orientation, training and leadership development and incentives / rewards – purposeful and aligned vs ad hoc practices
  - ❖ Incorporate into job documents and hiring practices measures to select for desired soft skills, competencies and way of work standards
- ❖ **Other:**
  - ❖ Identify opportunities for collaborative teams or secondments or other structural mechanisms to provide forums to reinforce, hone and develop new skills
  - ❖ Apply technology to allow people to focus on value added work that requires new skills – not just efficiencies but people growth opportunities. Prioritizing technology that aligns with desired skills – i.e. customer service.

# Service Delivery Presentation

# Key Context

The following facts/trends/assumptions have shaped our thinking:

- ❖ Public Service should focus on citizen centred services – even when not front facing
- ❖ Technology as a basic human right
- ❖ Desire for improved services at lower cost, convenience and immediacy
- ❖ Health & Wellness a Community Priority
- ❖ Demand for Information and Transparency
- ❖ Sustainable Communities
- ❖ National workforce shortage – Great Resignation; Boomers; Shifting Values
- ❖ Internal Support Delivery Model (Internal Customer Service) Critical to Address

# The Compelling Case for Action – the why?

The following points emphasize the need for County action:

- ❖ Demand for modern and customer centric approach to all municipal services including internal corporate support services
- ❖ Digital era magnified by pandemic and transformed the expectations of the public related to local service delivery and access to services & information
- ❖ The need for departments to break down traditional silos and become more connected, both within the organization and the community
- ❖ Today's workforce is choosing modern, digitally enabled, socially aware workplaces that align with their expectations, values and aspirations – if we cannot provide that we will not be competitive in obtaining the level of technological skills required in our staff to keep up with public expectations
- ❖ Growth & demographic demands



# Key Catalytic Questions

What types of services and access to services does/will the community expect?

- Citizen centred service delivery – outside-in approach
- Technology based services and access to technology
- Improved, timely and convenient services – reduced costs
- Inclusive & diverse services

How do we ensure that service delivery decisions meet the needs/demands of the public/taxpayers?

- Decisions should be informed by demographics, growth, community input, data, best practices & trends
- Legislative compliance; process improvement; contract management
- Support innovation
- Appropriate service delivery models and resources

# Key Catalytic Questions

How can we use technology to provide better/smarter service to the public?

- A holistic, organization wide approach vs. silo approach - critical to success of a customer centric organization
- Usability from the resident perspective should be first and foremost – not just internal needs

How do we meet demands for ‘immediacy’?

- Customer centric mindset
- Technology
- Standards
- Alternate Service Delivery Methods

# Key Catalytic Questions

Will we have a workforce that will work from home — and will the public expect to be able to do things from home?

- Remote workforce option required to remain competitive in recruitment of staff
- What opportunities does this provide to the corporation?
- Public expectation is improved access to self-service through technology

Which services should the County contract or bring in-house?

- Considerations:
  - core services vs secondary services
  - the need to retain control to mitigate risk
  - If we deliver it are we in competition with private sector?
  - What is the resource capacity to deliver the service?
- Partnership opportunities and hybrid models
- Union considerations

# Potential services to consider for contract, or hybrid in-house/contract model?

Corporate & Social Services	Financial & Data Services	Community & Development Services	Public Works Operations
<ul style="list-style-type: none"><li>• Legal Services</li><li>• Payroll</li><li>• POA Prosecutorial Services</li><li>• POA Collections</li><li>• Court Reporting</li><li>• Adjusting Services</li><li>• HR Training</li><li>• Pooled Insurance Options</li><li>• Promotional Publications</li></ul>	<ul style="list-style-type: none"><li>• IT Project Management</li><li>• IT Support – Equipment</li><li>• IT Support – Applications</li><li>• IT Support – Security</li><li>• Back end Website Management</li><li>• Tax Collection</li></ul>	<ul style="list-style-type: none"><li>• Bylaw Enforcement</li><li>• Animal Control</li><li>• Programming</li><li>• Economic Development</li><li>• Policing</li></ul>	<ul style="list-style-type: none"><li>• Curbside Collection</li><li>• Winter Control</li><li>• Grass Cutting</li><li>• Street Sweeping</li><li>• Skilled Trades</li></ul>

# Potential Near-Term Directions/Initiatives

**High priority:** *(based on impact, ease of implementation, or foundational item)*

- ❖ Service Review (foundational item)
  - ❖ Service inventory, satisfaction surveys, service level review, alternate service delivery methods, service gap analysis, recommendations, One Comprehensive Long Term Plan broken down into smaller Implementation Plans over terms of Council
- ❖ Target areas for immediate focussed review of external service delivery models (in-house, outsource, hybrid) and areas for future review as a result of overall service review
- ❖ Focus on hybrid service delivery model for internal corporate support functions:
  - ❖ Quasi-centralized corporate support from CSS and FDS Divisions
  - ❖ Explore Implementation of Process Improvement Business Unit (foundational item)

# County Role in Addressing Social Needs

# Topic: County Role in Addressing Social Needs

Key questions explored/addressed:

- ❖ What are the public demands and expectations re: social programs, general well-being, etc.?
- ❖ What is the County's role in the provision and support of human services?
- ❖ Does the County have a role in facilitating public transit?
- ❖ What is the County's role in establishing tools, programs and processes that respond to the housing affordability issue (that is, the 'missing middle' of housing)?
- ❖ What are the roles of upper levels of government (provincial, federal, etc.) in these areas



# Key Context

- ❖ The following facts/trends/assumptions have shaped our thinking:
  - ❖ Public demand for municipal services is expected to continue to increase
  - ❖ Social needs are complex, wide ranging and evolving
  - ❖ Population aged 65 and older growing six times faster than population under 14
  - ❖ Food, shelter and fuel costs rising at fastest rate in over 30 years
  - ❖ Public transit continues to be an area for discussion
  - ❖ Partnerships are an integral part of providing social services

# The Compelling Case for Action – the why?

- ❖ The following points emphasize the need for County action:
  - ❖ Council direction on the following:
    - ❖ Health and Social Services – Governance Review
    - ❖ Haldimand Norfolk Housing Corporation – Funding request
    - ❖ Hospitals and Dr. Recruitment – Funding request
    - ❖ Public Transit – Review Feasibility
  - ❖ Council Delegations on Poverty and Opioid Crisis
  - ❖ House Prices are up 150% since 2011 and 34% in the last year.

# Potential Near-Term Directions/Initiatives

- ❖ **High priority:** *(based on impact, ease of implementation, or foundational item)*
  - ❖ Governance of Haldimand Norfolk Health & Social Services
  - ❖ Housing Affordability - promote garden suites and secondary suites (accessory apartments/in-law suites) as options.
  - ❖ General Well-Being – Community & Recreation Facilities Strategy, Hagersville Active Living Centre, Broadband Access
  - ❖ Define County Role (i.e. Advocacy, Partner, Contributor, etc.)
- ❖ **Other:**
  - ❖ Clearly define “Social Needs”
  - ❖ Ensure Master Plans/Strategies/Policies consider Social Needs

# **Climate Change – Municipal Implications & Necessary Responses**

# Topic: Climate Change

Key questions explored/addressed:

1. **What is the County's role** in reducing emissions / greenhouse gases — with regard to our vehicles, buildings, etc.?
2. **What do we want to do** about the County's carbon footprint — what are our aspirations / potential strategies?
3. **How do we** build consideration of the environment into our municipal decision-making and processes (similar to triple bottom-line approach)?

# Key Context

- ❖ The following facts/trends/assumptions have shaped our thinking:
  - ❖ Climate change is real – adaptation and mitigation efforts are necessary
  - ❖ Weather events are becoming more extreme with increased flooding and erosion
  - ❖ County has much development / infrastructure in erosion and flood prone areas
  - ❖ County is looking at a period of intense urbanization in the next 30 years
  - ❖ County has a large inventory of buildings, many of which are not energy efficient
  - ❖ Energy supply / fuel sources are shifting and require appropriate response
  - ❖ County has a large fleet of internal combustion engine (ICE) vehicles
  - ❖ Upper level governments are imposing tighter standards / new requirements onto municipalities through new policy and legislation

# The Compelling Case for Action – the why?

- ❖ The following points emphasize the need for County action:
  - ❖ More frequent and intense storms lead to increased flooding / erosion which:
    - overwhelms / (prematurely) damages municipal infrastructure
    - leads to property damage / disruption to life (relocation) and economy
    - leads to potential for compensation to residents/businesses
    - disrupts work plans & productivity for County staff
    - economic cost = impacts County budgets
  - ❖ “Social policy”
  - ❖ Energy deficit and energy cost increases
  - ❖ Aging assets (buildings) in need of retrofits
  - ❖ Must respond to existing, prepare for new, legislative requirements



# Potential Near-Term Directions/Initiatives

- ❖ **High priority:** *(based on impact, ease of implementation, or foundational item)*
  - ❖ As part of the development of the Strategic Asset Management Plan:
    - incorporate flooding and climate change adaptation
    - address need for deep energy building retrofits
    - introduce necessity of fleet transition to EV
  - ❖ Complete the Haldimand County Energy Conservation and Demand Management Plan
  - ❖ Update development design standards to emphasize / require new approaches
  - ❖ Master Servicing Plan updates to identify opportunities - 'grey to green' infrastructure, vulnerable areas
  - ❖ Hazard avoidance – fully update regulatory instruments to 'restrict and protect'
  - ❖ Facilitate development of AT infrastructure / interconnected neighbourhoods
- ❖ **Other:**
  - ❖ plan for additional environmental protection roles – expand the County's natural sequestration capacity via (more) tree planting, natural asset securement & management, de-hardening public spaces
  - ❖ further develop the relationships / work with our CAs

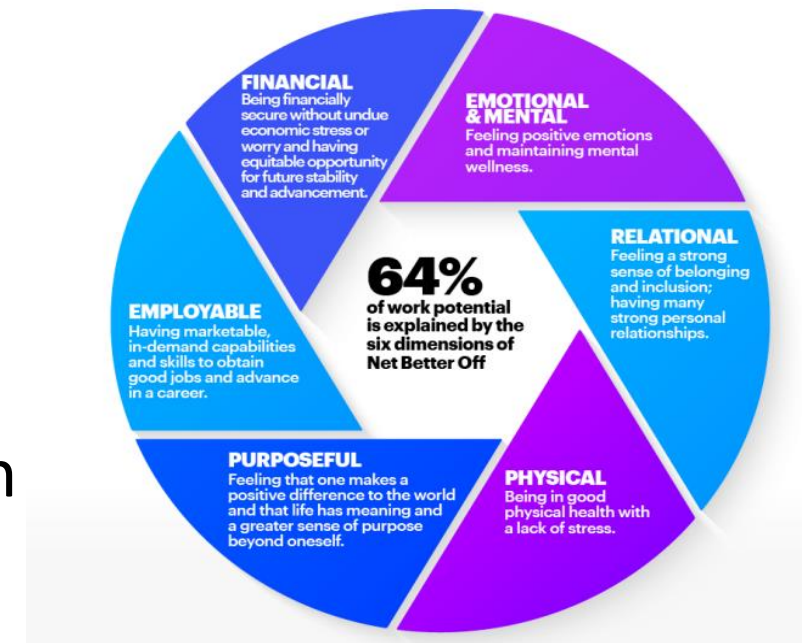
# **Key Administrative Priorities During Term of Council**

# Key Administrative Priorities 2022-2026

## 1. Talent Attraction, Retention, and Growth from Within

- Adopt a Net Better Off Corporate Approach to Staff Relationships
  - Compensation Review – competitive wages
  - Update recruitment, orientation, training, leadership development processes/documents to incorporate key skills and corporate values
  - Implement a mentorship program to build from within

## 2. Develop a Long Term Financial Plan for Growth



# Next Steps: Establishing Term of Council Priority Items

## Why?

- Maintains focus on key items identified by Council
- Helps continue to move the organization and community forward
- Workload management

## Process:

### **February 13<sup>th</sup> Orientation (Part 3)**

- Review current ongoing initiatives
- Expected key decisions during this term

### **February 16<sup>th</sup> Council Workshop**

- Situational Analysis – Key Issues, Concerns Council is hearing
- Capacity Currently Allocated – Major On-Going Matters
- Council Identified New Initiatives
- Ranking and Prioritizing Council Initiatives
- Report to Council to Approve Corporate Priorities (Fall)