

# **PROPOSAL**

from

**BILL WINEGARD and Associates**

to assist

**THE MUNICIPALITY of BROCKTON**

toward a

**BROCKTON ACTION PLAN 2025**

August, 2020

## **OUR APPROACH**

### **I. The value of a Strategic Plan**

We know from experience that a strategic plan is a key piece of effective municipal governance. Its success can be measured by:

- Council and staff using it when making future decisions
- Council and staff using it to set priorities for the use of always-scarce time and resources
- Motivation for staff, community groups, and other governments to work with you
- Council considering itself accountable to achieve what it said it would
- Staff reporting regularly on progress and Council reporting to the community
- Trust and cooperation among Council, staff and the community, all parties knowing what is wanted and what is possible to achieve, and being able to celebrate their successes

## 2. NOT A STUDY

To us, it is important to emphasize that the consultants are **not conducting a study**. We do not produce the strategic plan - Council does (with advice from staff and input from community stakeholders).

As experienced municipal observers and skilled facilitators, we certainly have a valuable role to play. But that role is not to tell the Council, professional staff and members of your community what's going on in Brockton and what you should be doing over the next five years.

Rather, our role is to:

- facilitate the engagement of residents, businesses, community organizations, municipal personnel and other key agencies and individuals in the process of developing the plan
- facilitate Council's discussion of what it wants to achieve, and provide structure for that discussion; keeping it focussed and forward-looking
- help staff to inject relevant, timely information to Council's strategic deliberations
- help Council to be as clear, practical, and meaningful as possible in the guidance they give - through the strategic plan - to staff and the community
- help Council and staff to identify progress measures and milestones for subsequent reporting to the community

## 3. "Ghost-writers"

We see ourselves as Council's "ghost writers". We are the ones to "put pen to paper" but we do so on Council's behalf. The meaning and intent will accurately reflect what Council wants to say. **The plan will not sit on a shelf because, in effect, Council will have written it.**

Similarly, we see ourselves as ghost-writers for the elements of the community that we will have consulted. Our summary will capture their perceptions and their priorities.

#### **4. Priority-setting**

In municipal government we know that the range of programs and projects that people would like always exceeds the resources that can be made available. Experience tells us that creating an expectation of all things to all people is a sure recipe for disappointment and discord.

So, in our strategic planning process, we use a series of tried and true processes that yield clear priorities, that balance what is important with what is feasible, that indicate not just what is hoped for but also how much can be achieved. It is our job to make sure the plan gets past vague wishes and sets clear priorities.

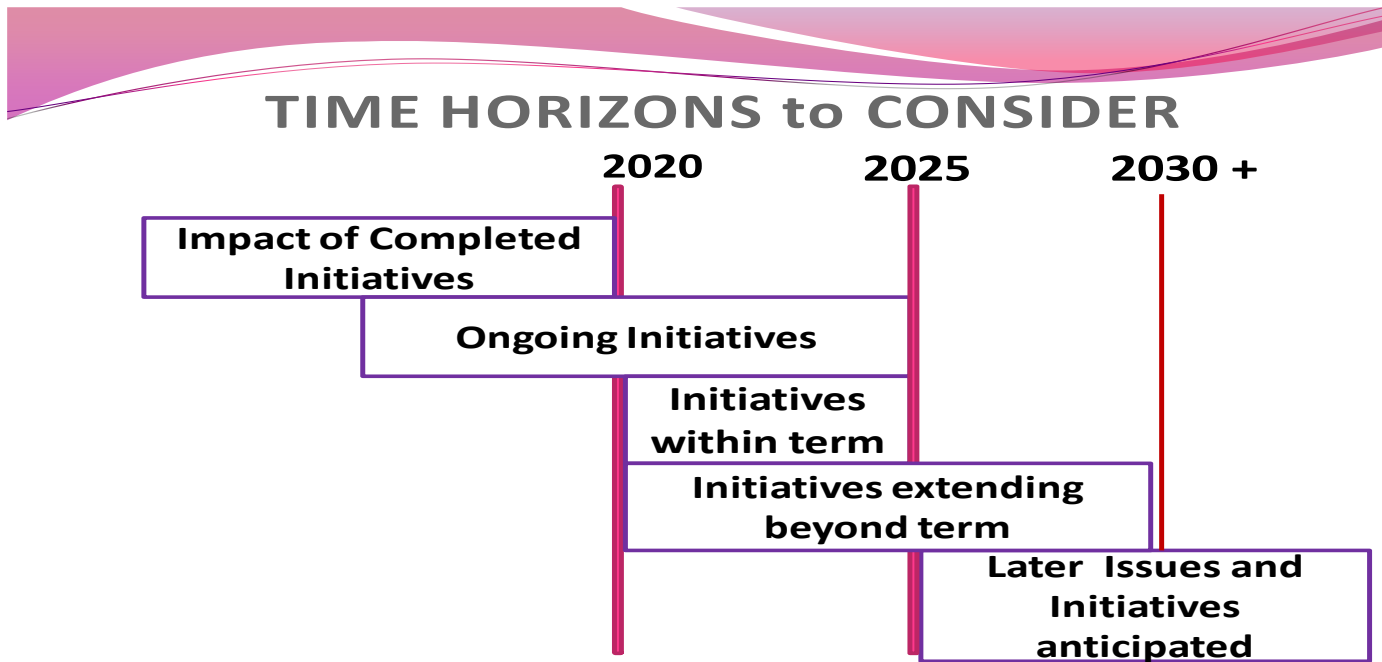
#### **5. Meaningful measures**

Council and staff must of course measure output (number of senior activity classes offered, kilometers of road repaved, how many rezonings processed, etc.). As important as these measures are, though, they fail to measure value. So what? The plan needs to contain outcomes that will make Brockton better...how many more people stayed physically active, how much better are ride conditions on the roads, what kind of development has the zoning encouraged, etc. The process should yield measures of achievement at both levels

#### **6. Time Horizons**

Effective strategic planning not only focuses on the period at hand; it also takes into account any carry-forwards from the past. Whatever we picture for the future will require time and resources, but what we carry over from the past will lay claim to some of that time and those resources. The good work done in the past may have repercussions for the future. Positive past relationships and partnerships with local businesses can be a platform for new initiatives. A new road or arena will not stay new; staff time will be needed now for operations, and money will be needed in the future for repairs.

Similarly, issues identified, and initiatives launched within the five-year term of the plan won't all end within those five years. The leadership shown now may only bear fruit much later (for example, a feasibility study conducted in 2020 may initiate a project not completed until 2030, or a need identified for 2030 may need a fund to be established in 2020).



**7. Not Reinventing the Wheel**

Brockton's 2013 strategic plan is outstanding... well-structured, comprehensive, ambitious but practical, and derived from a wealth of community input. It would be a waste of time and money to start from scratch. What's needed for the next five years is a review of its strategies and a refresh of proposed initiatives.

There's no need to question the Plan's four pillars (e.g. Economic Development) or its worthy goals (e.g. , from page 20 of the 2013 plan,

"Employment -

Goal: Brockton is home to progressive businesses that provide employment opportunities and economic benefits").

We will focus discussion at the level of Strategies (e.g. from page 21 of the 2013 plan:

**"Work with local partners to attract businesses." )**

and the actions - both new and ongoing - to implement those strategies (e.g. from page 21 of the 2013 plan:

**"Establish an ambassador program with local business people to meet with interested investors and sell Brockton as a place to do business )"**

**EXPERIENCE**

**MUNICIPALITY of BROCKTON**  
**Toward an ACTION PLAN 2025**  
**PROCESS, TIMING, CONSULTANT COST**

**Bill Winegard**

As CAO, Bill Winegard introduced strategic planning to both Gravenhurst and Caledon, and personally facilitated Council's strategic planning days. Subsequently, he spearheaded the building of Council priorities into the operating, capital and multi-year budgets, department business plans, and performance reviews with department heads.

Since 2004, Bill has worked with a dozen municipalities to help develop Council Statements of Priorities and Community Action Plans. These projects have ranged from a single-day priority-setting workshop to extensive processes which entailed community group consultation, surveys, detailed staff input, and several stages of Council deliberation. Bill and a colleague have co-taught the two-day strategic planning segment of the Masters Certificate in Municipal Leadership program offered by the Schulich (York) Centre for Executive Education. In this role, Bill has trained over 125 municipal senior staff from across Canada on the value and purpose of municipal strategic planning, as well as detailed "how-to" steps for the development and implementation of priorities statements and action plans.

Bill will be the contractor with the Municipality, responsible for on-time and on-point completion, and the primary author of all documents. Bill's resume is included in *Appendix A*.

**Maureen McCauley**

After a career in engineering and management with the Town of Richmond Hill and City of Burlington, Maureen established a highly-regarded consulting niche for dozens of municipalities large and small, primarily in the field of Operations and Process Review and Improvement. Her approach to assignments is highly engaging as well as well-organized. Being the Executive Director of the Ontario Municipal Administrators Association, she is in touch with municipalities across the province. Maureen and Bill have worked together on several projects for the Township of Centre Wellington including most recently the Township's 2019-2022 strategic plan.

Maureen's primary role will be to co-facilitate the three Council/senior staff workshops and to assist Bill in capturing the results of those workshops.

STEP in the PROCESS	OUTCOME	September	October	November	December	BILL DAYS	MAUREEN
<b>Intro meeting with CAO and senior staff</b> <i>- week of Sept 8 or 14</i>	<ul style="list-style-type: none"> <li>tentative dates for all subsequent steps</li> <li>outline communication roles in process</li> <li>inventory/collection of relevant previous plans and studies</li> <li>status update on implementation of previous strategic initiatives</li> </ul>					NC	
<b>Review of 2013 plan implementation and other studies</b> <i>Weeks of Sept 14 and 21</i>	<ul style="list-style-type: none"> <li>ultra brief summary of progress since 2013 and issues arising</li> <li>circulation to Council</li> </ul>					1	
<b>First Workshop with Council and senior staff</b> <i>Week of Sept 28</i>	<ul style="list-style-type: none"> <li>review of Brockton's successes, disappointments, opportunities, threats in pursuing the 2013 goals and strategies</li> <li>preliminary set of questions for public survey</li> </ul>					1.5	1.5
<b>Mtgs (2) with Brockton's non-management staff - Intro to strategic planning</b> <i>Week of Sept 28</i>	<ul style="list-style-type: none"> <li>staff readiness to participate during process and encourage others</li> <li>another view of Brockton's successes, disappointments, opportunities, threats</li> </ul>					NC	NC
<b>Discussion Paper "Planning for 2025"</b> <i>Week of October 5</i>	<ul style="list-style-type: none"> <li>short (2-pages?) for distribution via website, Facebook, Library, etc.</li> <li>discussion-starter on Brockton's successes and disappointments on 2013 Goals and strategies</li> <li>How the public can get involved in Action Plan process</li> </ul>					0.5	

<p><b>Random-sample mail-out survey</b>  - draft by consultants; implementation by staff; analysis by consultants  <i>Mail-out Week of Oct 5</i>  <i>Deadline Oct 23</i></p>	<ul style="list-style-type: none"> <li>statistically reliable prioritization of issues by Brockton taxpayers</li> <li>input from taxpayers of potential actions/solutions</li> <li>consultant's report on survey results</li> </ul>					1	
<p><b>On-line public survey</b>  <i>Posted/advertised week of Oct 5</i>  <i>Closed Oct 23</i></p>	<ul style="list-style-type: none"> <li>prioritization of issues by any interested Brockton resident</li> <li>Open opportunity for input of potential actions/solutions</li> <li>consultant's report on survey results</li> </ul>					0.5	
<p><b>Second workshop with Council + senior staff</b>  <i>Week of November 2</i></p>	<ul style="list-style-type: none"> <li>Council prioritization of issues and directions to 2025</li> <li>Preliminary set of strategies and potential actions, for purpose of public feedback</li> </ul>					1.5	1.5
<p><b>Preliminary Action Plan</b>  <i>Week of November 9</i></p>	<ul style="list-style-type: none"> <li>expressly intended for public feedback + generation of additional potential actions</li> <li>accompanied by posting on-line of consultant's reports on survey results</li> </ul>					0.5	
<p><b>Feedback Focus Groups (5)</b>  - 4 mtgs each with 10-12 sector reps by invitation (e.g., business, social/health, etc.)  - plus 1 mtg with non-management staff  <i>Week of November 16</i></p>	<ul style="list-style-type: none"> <li>participants' assessment of effectiveness, priority, feasibility, support, and timing, of preliminary proposed actions to 2025</li> <li>generation of additional potential actions</li> <li>consultant's report on focus group input</li> </ul>					2	
<p><b>Technical Assessment Mtg with senior staff</b>  <i>Week of November 16</i></p>	<ul style="list-style-type: none"> <li>input to Council re any issues that could affect the feasibility and timing of proposed actions - legal, engineering, cost, revenue, relationship to ongoing initiatives, necessary conditions, etc</li> </ul>					NC	
<p><b>Third workshop with Council + senior staff</b>  <i>Week of November 30</i></p>	<ul style="list-style-type: none"> <li>Review of preliminary draft priorities and actions based on focus group and senior</li> </ul>					1.5	1.5



	<p>staff assessment</p> <ul style="list-style-type: none"> <li>• Heavy focus on feasibility, timing, clarity, and appropriate measures of progress and outcome</li> <li>• Final review of proposed actions</li> </ul>						
<p><b>Full semi-final draft of Action Plan 2025</b> <i>Week of December 7</i></p>	<ul style="list-style-type: none"> <li>• clear, coherent, prioritized action plan, with rationale for proposals, timing, resource implications, measures, implementation roles</li> </ul>					1	
<p><b>Opportunity for electronic feedback on semi-final draft</b> <i>Week of December 14</i></p>	<ul style="list-style-type: none"> <li>• Final comment (if any) from Council members and Dept heads</li> <li>• Posting on website, Facebook, etc., with brief opportunity for feedback</li> </ul>						
<p><b>OPTIONAL:</b> <b>opportunity for public to provide feedback at a Committee of the Whole meeting</b> <i>Week of December 14</i></p>							
<p><b>Revisions and Final Draft</b></p>						0.5	
<p><b>Presentation to Council of final draft Brockton Action Plan 2025</b></p>						0.5	
<p><b>TOTAL CONSULTANT EFFORT</b></p>						12	4.5
<p><b>COST: 16.5 days @ 900/day = \$14,850</b></p>							

## **APPENDIX A – BILL WINEGARD - RESUME and Strategic Planning Profile**

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winegard@rogers.com

416-695-8992

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### **EXPERIENCE**

#### ***Municipal Management Consultant***

2002 – present: Self-employed

#### ***Chief Administrative Officer***

1998 – 2002: Municipality of Caledon

#### ***Chief Administrative Officer/Clerk***

1991 – 1998: Municipality of Gravenhurst

#### ***Ministry of Municipal Affairs***

Manager, Community Planning Advisory Branch, Sudbury  
Community Planner, Plans Administration Branch, Toronto

#### ***Ministry of Natural Resources***

Regional Planner, MNR Northern Region, Timmins

#### ***Waterloo Regional Government Review Commission***

Director of Research, Waterloo

#### ***Ministry of Intergovernmental Affairs***

Policy Advisor, Local Government Organization Branch, Toronto

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### **EDUCATION**

Master of Environment Studies (Municipal Planning), York University

Bachelor of Arts (Political Science), University of Toronto

Municipal Clerks and Treasurers Diploma Course, Seneca College

Member, Ontario Municipal Administrators Association

Member, Ontario Professional Planners Institute

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### **SELECTED CONSULTING ASSIGNMENTS - STRATEGIC PLANNING**

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Facilitation of Council's Goals and Strategies Statement; Client: City of Elliot Lake  
Council's Objectives and Priorities Statement: Client: BMA Consultants/City of Timmins  
2007-2010 Council Strategic Plan - Client: Municipality of Northeastern Manitoulin  
2007-2010 Council Strategic Plan - Client: Town of Innisfil  
Council Strategies and Priorities - Client: Township of Black River-Matheson  
Strategic Plan - Client: Saugeen Valley Conservation Authority  
Waterfront Action Plans - Client: Township of Hamilton  
Community Action Plan 2018- Client: Township of Southgate  
Community Action Plan 2023: Community Consultation - Client: Township of Southgate  
Strategic Plan 2018 Facilitation - Client: Municipality of Clarington  
2015-2018 Strategic Plan - Client: Township of Centre Wellington  
2019-2022 Strategic Plan - Client: Township of Centre Wellington  
Community Action Plan 2020 - Client: Municipality of West Grey  
Strategic Plan Update Facilitation - Client: County of Grey  
Community Action Plan 2018 - Client: Municipality of Lambton Shores  
Corporate Strategic Plan 2019-2023 - Client: Town of Penetanguishene  
Strategic Plan 2019-2022 - Client: Town of Hanover  
Strategic Plan 2019-2022 - Client: Township of Mapleton  
Strategic Plan Facilitation 2019-2022: Client: Municipality of Central Elgin  
Strategic Plan 2025 - Client: Municipality of Middlesex Centre  
Council Statement of Priorities (as CAO): Municipality of Gravenhurst, 1992, 1995, 1998  
Council Statement of Priorities (as CAO): Municipality of Caledon, 1999

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## **STRATEGIC PLANNING TRAINING**

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Strategic Thinking/Strategic Planning - Client: Schulich Executive Education Centre (SEEC) Municipal  
Leadership Certificate Program (open enrolment)  
Strategic Thinking/Strategic Planning - Client: SEEC/ City of Windsor  
Strategic Thinking/Strategic Planning - Client: SEEC/City of Ottawa  
Strategic Thinking/Strategic Planning - Client: Municipality of Ajax

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## **OTHER ASSIGNMENTS**

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Operations/Service Delivery Reviews: 14 Municipalities + OGRA

Organizations Reviews: 13 Municipalities

Researcher/Case Study author: Ontario Centre for Municipal Best Practices (AMO)

Planning and Economic Development: 7 municipalities + Ministry of Municipal Affairs

CAO Recruitment: 8 municipalities

Other Human Resource-related assignments: 7 municipalities