



# APPENDIX: CORPORATE STRATEGIC PLAN TECHNICAL REPORT

## MUNICIPALITY OF KINCARDINE

2020-2025



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# 1. Introduction

This technical report has been prepared as a comprehensive presentation of primary and secondary research and analysis carried out as part of the Strategic Plan methodology. It serves as a supplement to the Municipality of Kincardine's Corporate Strategic Plan 2020-2025.

This information was shared over the life of the project to help Council in the development of the strategic pillars and priorities that form the final 2020-2025 Strategic Plan. Examining both internal and external input received through the broad engagement activities that took place ensured that the Municipality of Kincardine's Corporate Strategic Plan was based on local insight, perspectives, and input. The technical report will further assist management and staff in the development of departmental business plans and appropriate performance measures.

Included in this report is:

- The development of a community profile through a Base Analysis of relevant socio-economic indicators, utilizing Statistics Canada data and Canadian Business Counts
- A Document Review of relevant background documents and strategies from the Municipality of Kincardine and community partners
- A Consultation Summary of the engagement activities, including:
  - Conversations with Council members and staff
  - Interviews with stakeholders and community partners
  - Results emerging from an online community survey of residents
  - A facilitated conversation circle with frontline staff
  - Results emerging from an online staff survey made available to all municipal staff via the Bang the Table platform
  - Results emerging through facilitated sessions with the community, business and committee of Council members

# 2. Base Analysis

The following analysis is designed to examine the socio-economic characteristics of Kincardine and identify areas of competitive strength and areas for attention and consideration.

- Statistics Canada, Canadian Census 2011 and 2016
- Statistics Canada, National Household Survey (NHS), 2011
- Statistics Canada, Canadian Business Counts, December 2017

In addition to studying the Municipality of Kincardine, comparators used in the economic base analysis





include the following:

- Bruce County
- Province of Ontario

## 2.1 Demographic Portrait

Since 2006, Kincardine's population has grown marginally, from 11,173 in 2006 to 11,389 in 2016. There was virtually no change from 2006 to 2011 and only a 1.9% growth rate from 2011 to the most recent Census in 2016. Bruce County has experienced a 3.1% growth rate over the same period. Kincardine's population growth rate from 2011 to 2016 was less half of the population growth rate for the Province of Ontario as a whole. The relative flat population growth trend for Kincardine has persisted despite the relative economic prosperity that the municipality has experienced over the period in question.

**Figure 1: Population Change 2006 to 2016**

Year	Kincardine	Bruce County	Ontario
2006 Census	11,173	65,349	12,160,282
2011 NHS	11,174	66,102	12,851,821
2016 Census	11,389	68,147	13,448,494
2011 to 2016 Population Growth rate	1.9%	3.1%	4.6%

Source: Statistics Canada; 2006 Census Profile, 2011 Census Profile, 2016 Census Profile.

The median age in Kincardine was significantly higher (6.5 years) than that of the Province of Ontario in 2011 and virtually the same as the median age of Bruce County. From 2011 to 2016, Kincardine's median age was slightly lower (-0.4 years), while Bruce County (+1.5 years) and the Province (+0.9 years) median age increased.



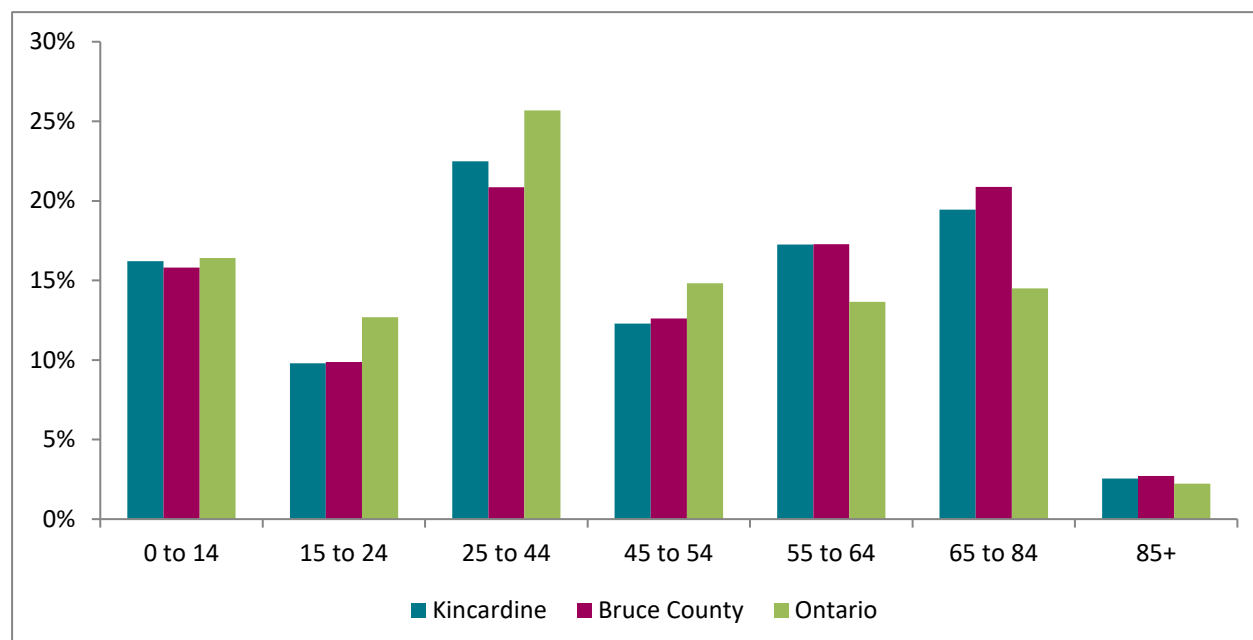
**Figure 2: Median Age, 2011 and 2016**

Year	Kincardine	Bruce County	Ontario
Median age population 2011	46.9	47	40.4
Median age population 2016	46.5	48.5	41.3

Source: Statistics Canada; 2011 Census Profile, 2016 Census Profile.

Figure 3 shows the distribution of Kincardine by age-groups for the 2016 Census. Kincardine and Bruce County contained a similar age distribution among the various age groups with a visible higher proportion of the core working-age population (25 to 44 years) in Kincardine than Bruce County and a slightly higher proportion of the retirement-aged population in Bruce County than Kincardine. Both Bruce County and Kincardine had larger proportions of their population in the oldest age categories (55 years +) than the Province.

**Figure 3: Age Characteristics, Percentage of Overall Population – Detailed Categories**



Source: Statistics Canada; 2016 Census Profile.

## 2.2 Dwelling Characteristics

The vast majority of housing in Kincardine is single detached (81.2%), followed by Apartments in a building that has fewer than five storeys (7.1%) and row houses (6.9%). Dwelling types across Bruce County were relatively similar to Kincardine. However, when compared to Ontario, there is a dramatic difference in dwelling types with a much higher prevalence of higher density housing. In particular, whereas Ontario has 17.2% of dwellings in apartment buildings with five or more storey, Kincardine had no dwellings of this type.



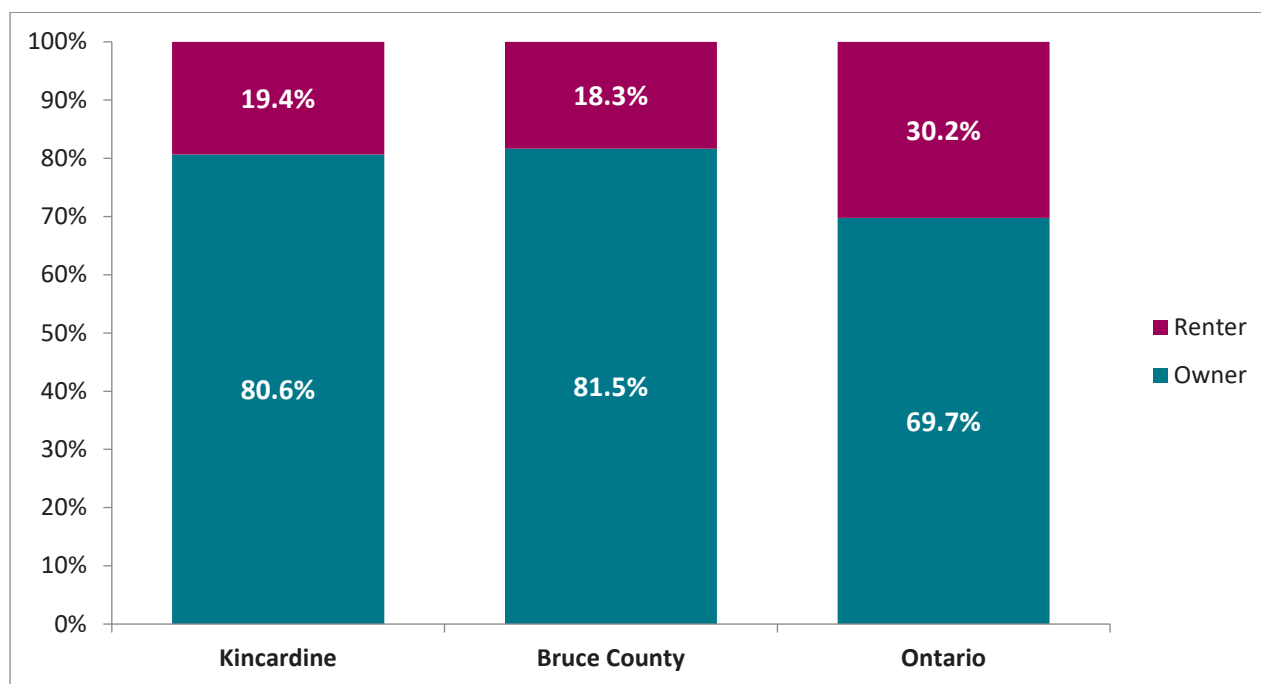
**Figure 4: Occupied Dwellings by Type, Percentage of Overall Population**

Type of dwellings	Kincardine	Bruce County	Ontario
Single-detached house	81.2%	83.7%	54.3%
Apartment in a building that has five or more storeys	0.0%	0.0%	17.2%
Semi-detached house	2.9%	2.2%	5.6%
Row house	6.9%	4.1%	8.9%
Apartment or flat in a duplex	1.0%	1.1%	3.4%
Apartment in a building that has fewer than five storeys	7.1%	7.5%	10.1%
Other single-attached house	0.7%	0.5%	0.2%
Movable dwelling	0.1%	0.8%	0.3%

Source: Statistics Canada; 2016 Census Profile.

Kincardine had a much higher proportion of owners than renters in terms of private dwellings with 80.6% owners and 19.4% renters. Ontario had a much lower proportion of owners at 69.7%, with 30.2% renters. This larger tendency towards ownership than renting is consistent with the types of dwellings available being primarily single detached with very low percentages of apartments. This largely owner dwelling could be indicative of a shortage of rental housing supply.

**Figure 5: Dwelling Owners Compared to Renters, 2016.**



Source: Statistics Canada; 2016 Census Profile.



The median value of dwellings in Kincardine has increased by approximately 12% between 2011 and 2016 compared to a 10% increase in Bruce County. When looking at the Province where median values increased by 33% over the same period, Kincardine's values have experienced slow growth in comparison. When looking at cost for rented dwellings, Kincardine experienced a 21% increase over the period compared to 17% in Ontario. The sharp increase in rental costs combined with a low apartment proportion may be indicative of the current and potential tightness of the rental market in the future.

**Figure 6: Average Dwelling and Shelter Costs for Rented Dwellings**

Characteristics	Kincardine	Bruce County	Ontario
Median value of dwellings (\$) - 2011	\$ 250,689	\$ 249,918	\$ 300,862
Median value of dwellings (\$) - 2016	\$ 279,628	\$ 274,563	\$ 400,496
Median monthly shelter costs for rented dwellings (\$) -2011	\$ 768	\$ 701	\$ 892
Median monthly shelter costs for rented dwellings (\$) -2016	\$ 928	\$ 836	\$ 1,045

Source: Statistics Canada; 2011 National Household Survey Profile, 2016 Census Profile.

One of the limitations of Statistic Canada's Census data is the lag time between conducting the Census and reporting on results. As the housing market is prone to rapid changes, data from the Realtors Association of Grey Bruce Owen Sound (RAGBOS) and the Canadian Real Estate Association (CREA) were used to complement Statistics Canada and provide a more current picture of the housing market. According to RAGBOS, the average price of homes sold in September 2019 was \$404,914 which was an increase of 12.6% from September 2018<sup>1</sup>. The year-to-date average price was \$389,411, up 8.8% for the same nine-month period in 2018. Increased home prices were also compounded by the availability of homes with 3.5 months of inventory at the end of September 2019, a decrease from the 4.2 months recorded at the end of September 2018. As part of their October 2019 report, CREA reported an annual average home price of \$397,000 at the national level when excluding Vancouver and Toronto.<sup>2</sup> The average home prices reported by RAGBOS and CREA do not directly apply to the Municipality of Kincardine specifically but do help paint the picture of a housing market that has become increasingly unaffordable for many lower-income earners over the past 3-4 years.

## 2.3 Income

Looking at income, median individual income has grown by about 14% in Kincardine, as reported in the last two Census periods with a provincial growth of 10%. The median individual income remained higher in Kincardine compared to the Province and the gap increased from just over \$4000 to almost \$6000.

<sup>1</sup> [http://www.ragbos.ca/public\\_docs/documents/RAGBOS%20Stats%20Release%20September%202019%20\(4pg\).pdf](http://www.ragbos.ca/public_docs/documents/RAGBOS%20Stats%20Release%20September%202019%20(4pg).pdf)

<sup>2</sup> <https://creastats.crea.ca/en-US/>





**Figure 7: Median Total Individual Income**

Characteristics	Kincardine	Bruce County	Ontario
Median total income in 2010 among recipients (\$)	\$ 34,708	\$ 30,726	\$ 30,526
Median total income in 2015 among recipients (\$)	\$ 39,424	\$ 33,887	\$ 33,539
% change	14%	10%	10%

Source: Statistics Canada; 2011 National Household Survey Profile, 2016 Census Profile.

Shifting to the subject of median household income, Kincardine has a significantly higher median household income when compared to Bruce County and the Province of Ontario. The difference in household income between Kincardine and Ontario was approximately \$12,000 in both of the last Census periods.

**Figure 8: Median Household Income**

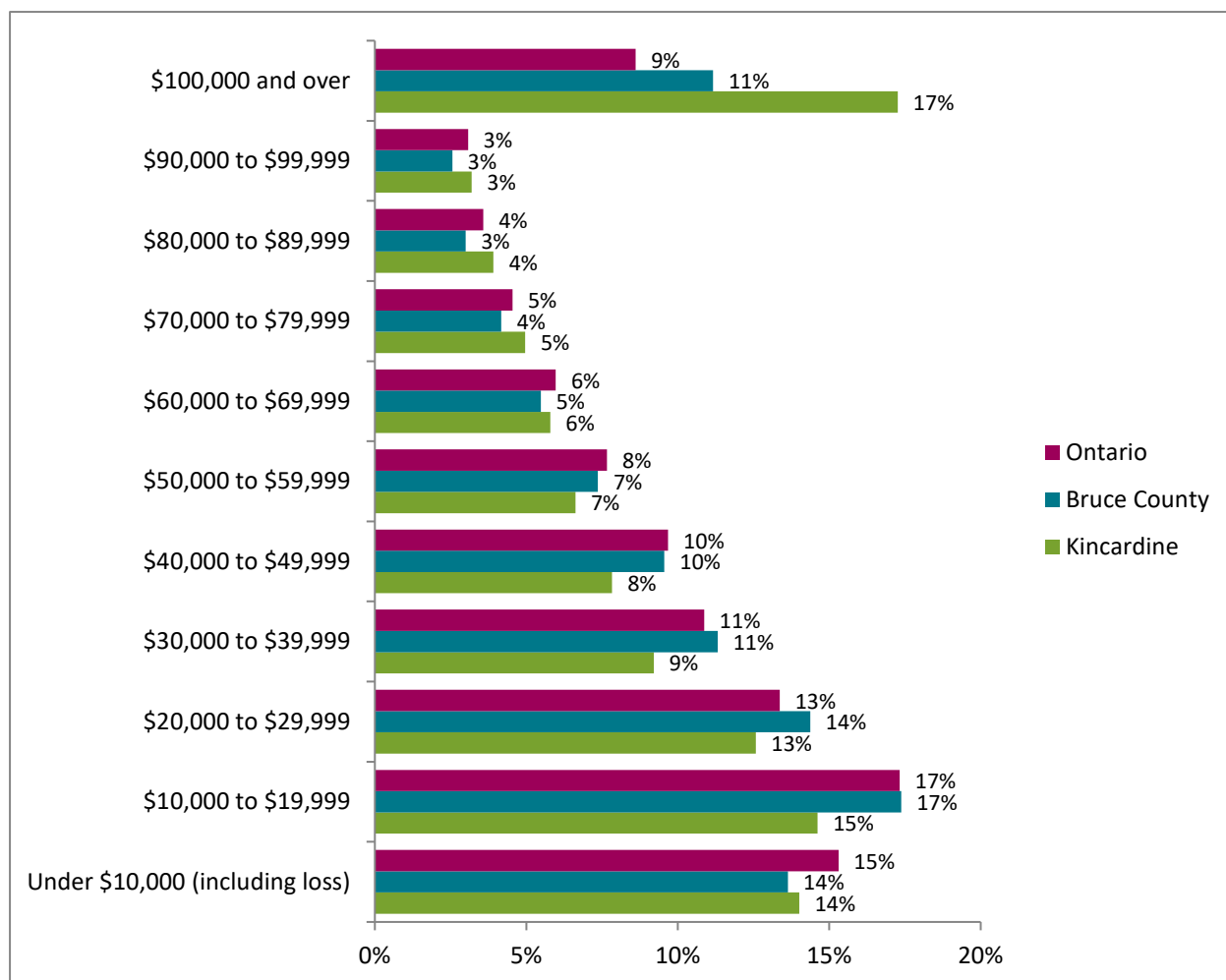
Characteristics	Kincardine	Bruce County	Ontario
Median total income of households in 2010 (\$)	\$ 78,284	\$ 66,321	\$ 66,358
Median total income of households in 2015 (\$)	\$ 86,363	\$ 71,193	\$ 74,287
% change	10%	7%	12%

Source: Statistics Canada; 2011 National Household Survey Profile, 2016 Census Profile.

In terms of distribution, Figure 10 shows that there is a notable cluster of households in the \$100,000 and over income range. Across the income groups of \$49,000 and under, Kincardine has a slightly lower proportion of household income than Ontario. The income distribution indicates a high proportion of high earning households with some lagging among the lower-income bands.



**Figure 9: Household Income Distribution, Percentage of Overall Population**



Source: Statistics Canada; 2016 Census Profile.

## 2.4 Education

Education attainment is important as it is often indicative of labour force capacity. The figure below summarizes skilled labour proportions for comparator areas, which is composed of those people that have completed an apprenticeship, college or university degree, diploma, or certificate. Skilled labour decreased slightly from 2011 to 2016 in Kincardine from 70% to 67%. Skilled labour across the province remained unchanged over the same period and despite the decrease, Kincardine still has a slightly higher proportion of skilled labour than Ontario.

**Figure 10: Proportion of Population (Ages 15 and Over) with Post-Secondary or Apprenticeship Education**

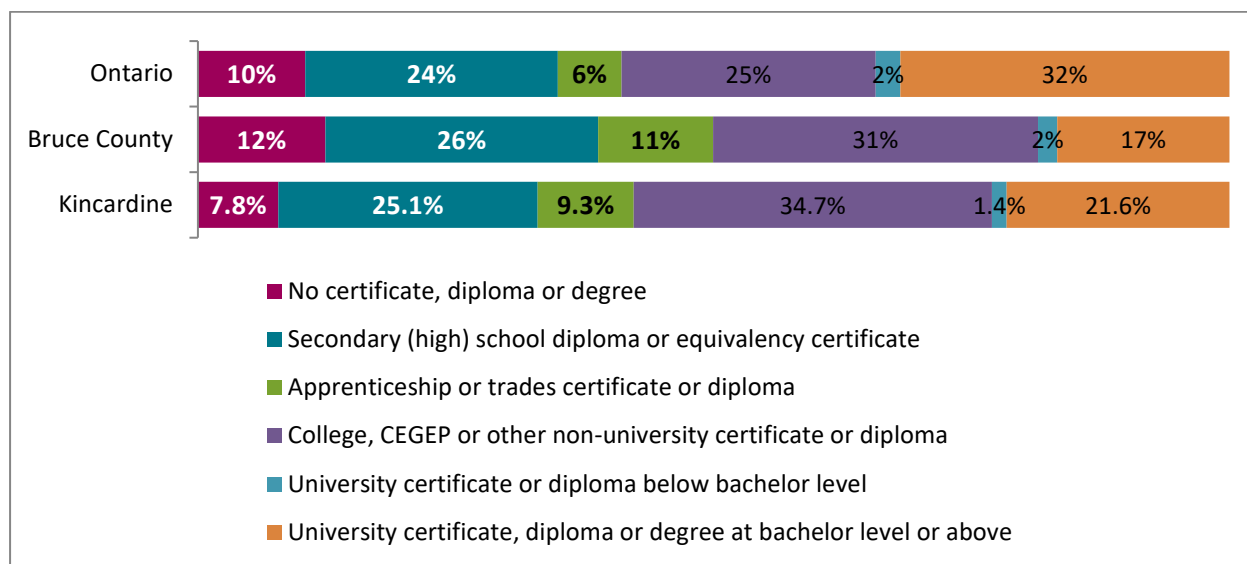
Year	Kincardine	Bruce County	Ontario
Skilled Labour 2011	70%	61%	65%
Skilled Labour 2016	67%	61%	65%



Source: Statistics Canada; 2016 Census Profile.

Kincardine had a much higher proportion of the primary working-age population in the 24 to 64 age group with college, CEGEP or other non-university certificate or diploma than the province with 34.7% compared to 25%. Kincardine's apprenticeship or trades certificate or diploma cohort was also higher than the province at 9.3% compared to 6%. The large proportion of the population with college and technical education is indicative of the types of programming offered with no university presence in the community and may be a factor inhibiting youth and talent retention as those looking for that level of education must leave the community.

**Figure 11: Highest Level of Education Attainment (Ages 24 to 64), % of the Population – Detailed Categories**



Source: Statistics Canada; 2016 Census Profile.

People's major field of study in Kincardine is architecture, engineering, and related technologies, which is notably higher than the province at 18.9% compared to 11% in the province. Business, management and public administration was the second most prevalent field of study at 9.1% but was lower than the province at 12%. Kincardine's field of study was fairly similar across the board with Bruce County. The high percentage of people studying architecture, engineering, and related technologies may have some correlation to the opportunities available within the nuclear sector and the high concentration of employment in the utilities sector.

**Figure 12: Major Field of Study (Ages 25 to 64), Percentage of the Population**

Major field of study	Kincardine	Bruce County	Ontario
No postsecondary certificate, diploma or degree	40.8%	46%	45%
Education	3.5%	4%	3%
Visual and performing arts and communications technologies	1.7%	1%	2%
Humanities	2.5%	2%	3%
Social and behavioural sciences and law	5.6%	4%	7%



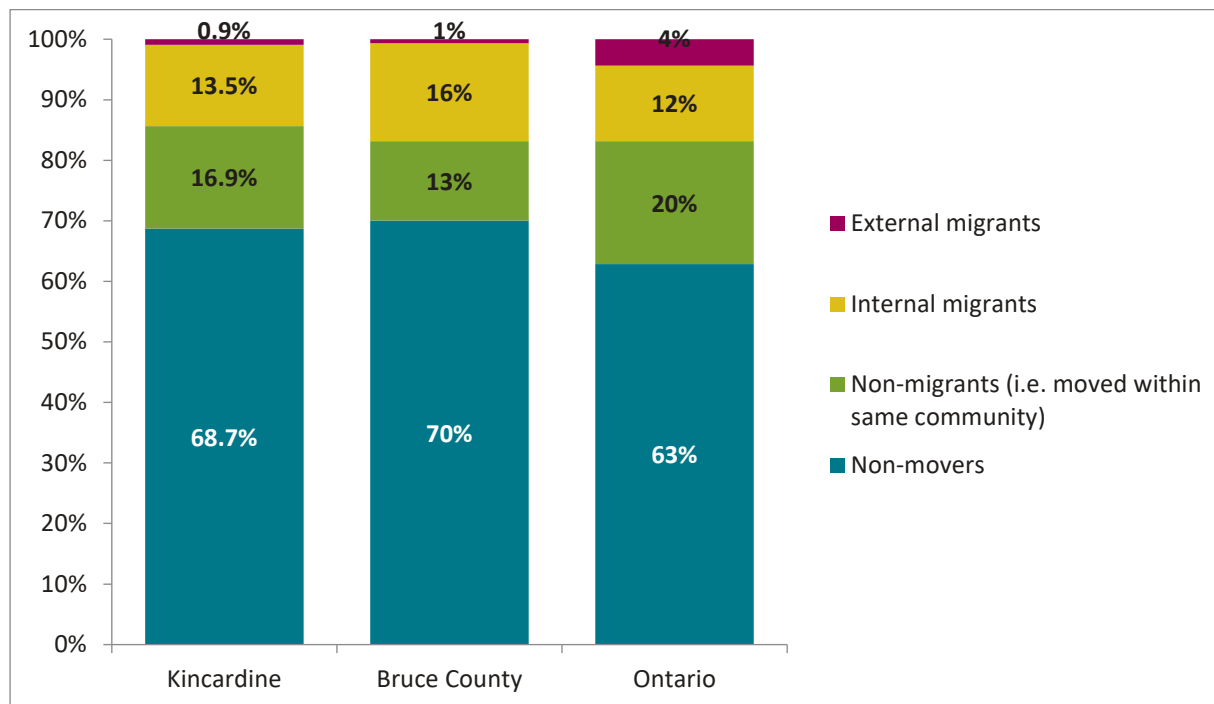
Major field of study	Kincardine	Bruce County	Ontario
Business, management, and public administration	9.1%	8%	12%
Physical and life sciences and technologies	2.3%	2%	2%
Mathematics, computer and information sciences	1.0%	1%	3%
Architecture, engineering, and related technologies	18.9%	16%	11%
Agriculture, natural resources and conservation	1.8%	2%	1%
Health and related fields	8.6%	9%	8%
Personal, protective and transportation services	4.1%	4%	3%
Other	0.0%	0%	0%

Source: Statistics Canada; 2016 Census Profile

## 2.5 Mobility

The movement of people within a community or to the community from somewhere else constitutes mobility. Statistics Canada tracks this in two ways, by asking if a household has moved within the past year and asking if a household has moved within the past five years. As of 2016, the majority of people in Kincardine, Bruce County, and Ontario had either stayed where they were five years earlier or moved somewhere in the same community. For Kincardine, this group constitutes a combined 85.6%, which is similar to Bruce County at 83% and the province at 83% as well. When looking at external migrants, Kincardine had less than 1% whereas the provincial percentage was 4%.

**Figure 13: Mobility Characteristics 5 years ago, 2016**



Source: Statistics Canada; 2016 Census Profile



## 2.6 Labour Force

According to Statistics Canada, employed persons are those having a job or business, whereas the unemployed are without work, are available for work, and are actively seeking work. Together the unemployed and the employed constitute the labour force<sup>3</sup>.

Between 2011 and 2016, Kincardine's labour force declined by 210 people, from 5,900 to 5,690. This decline translates to a decrease of 4%. Bruce County saw a much smaller decline at just 1%. While both Kincardine and Bruce County saw declines, the province as a whole saw an increase of 4% in the labour forces.

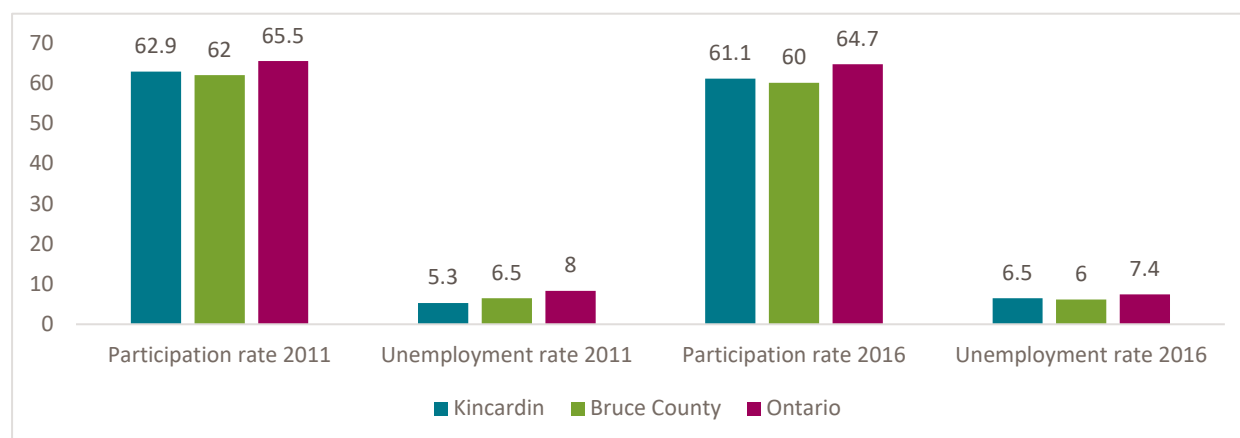
**Figure 14: Labour Force Size**

Labour Force Size	Kincardine	Bruce County	Ontario
In the labour force 2011	5,900	33,990	6,864,990
In the labour force 2016	5,690	33,635	7,141,675
Net (+/-)	-210	-355	276,685
% Change	-4%	-1%	4%

Source: Statistics Canada; 2016 Census Profile.

Unemployment rates grew by 1.2% between 2011 and 2016, while the participation rate declined by 1.8% in Kincardine. Over the same period, the provincial unemployment rate declined by 0.6%, and the participation rate declined by 0.8%. Kincardine's unemployment rate remained lower than the province over the period and may be an indicator of some tightness in the labour market. The declining participation rate in Kincardine may be partly attributed to the aging demographic profile. Combined with the lower participation rate and increased unemployment rate, there may be some indication that candidates are not ideally suited for the available jobs or that wages may not be at a level to support employment, especially in-service sectors.

**Figure 15: Labour Force Status, Percentage of Population**



Source: Statistics Canada; 2016 Census Profile.

<sup>3</sup> Statistics Canada, date modified 2008-12-01: [www150.statcan.gc.ca/n1/pub/81-004-x/def/4153361-eng.htm](http://www150.statcan.gc.ca/n1/pub/81-004-x/def/4153361-eng.htm)





Turning to the class of worker, 85.7% of the labour force in Kincardine are employees, which is very similar to the provincial percentage of 86%. Bruce County had a slightly higher percentage of self-employed persons at 16% than Kincardine and 13% and the province at 12%. The higher proportion of agricultural employment in Bruce County may be one explanation for this higher percentage as agriculture tends to be associated with large numbers of self-employed individuals.

**Figure 16: Class of Worker Ratio**

<b>Labour force status</b>	<b>Kincardine</b>	<b>Bruce County</b>	<b>Ontario</b>
<b>Class of worker - not applicable</b>	1.2%	1%	2%
<b>Employee</b>	85.7%	83%	86%
<b>Self-employed</b>	13.0%	16%	12%

Source: Statistics Canada; 2016 Census Profile.

## 2.7 Employment by Industry

Most notably in the figure below, declines in employment are evident utilities (-220 people), retail trade (-115 people), and accommodation and food services (-90 people). Retail trade and accommodation and food services tend to be population-based industries, meaning that they tend to grow or decrease in relation to population. There is also an appreciation that employment in the utilities sector tends to generate high wages and may also be a driver of spending in retail and accommodation and foodservice. There were some notable increases in healthcare and social assistance (+115 people), construction (+90 people) and manufacturing (+75 people).



**Figure 17: Employed Labour Force by Industry (Number of People)**

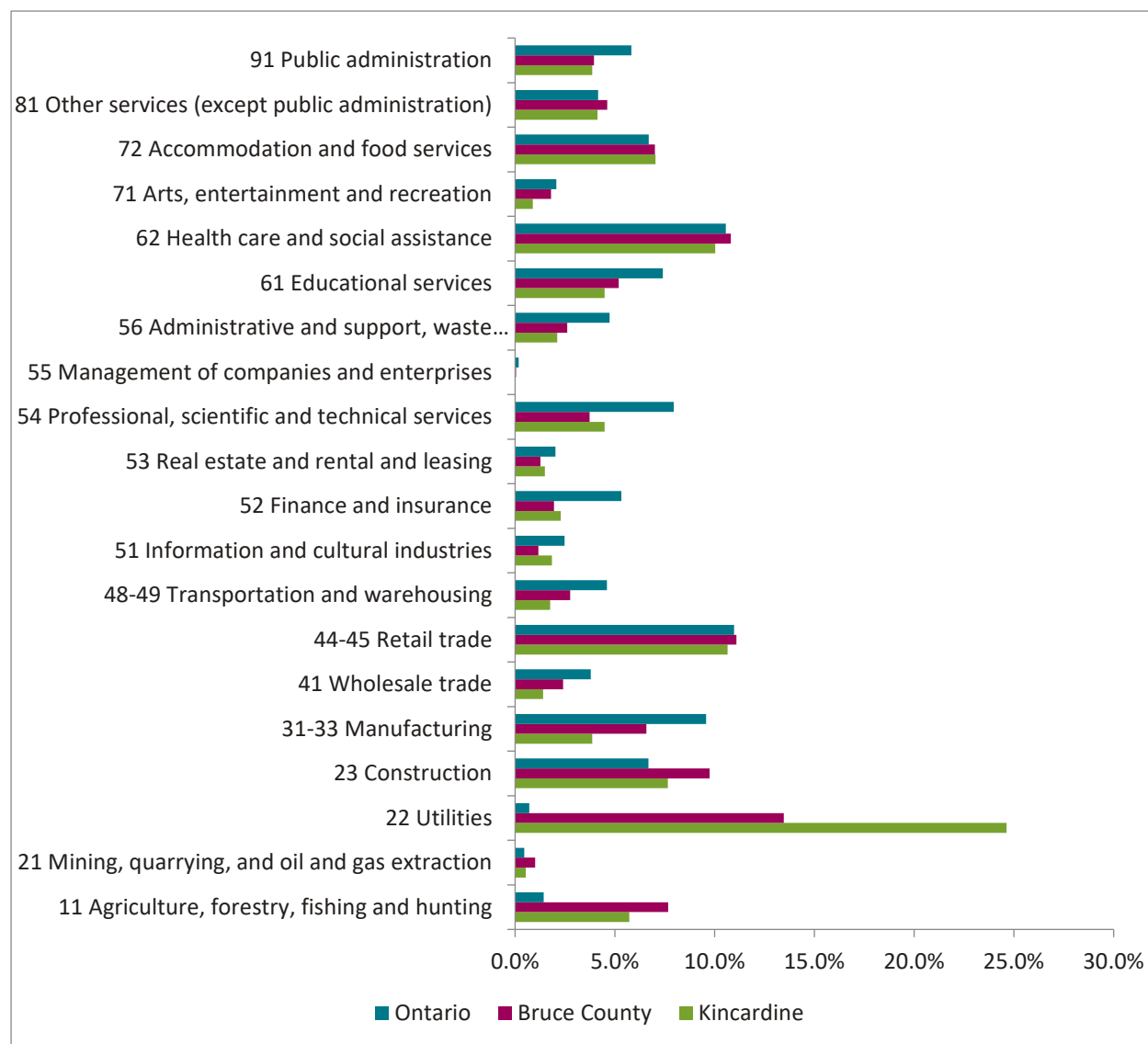
Industry (NAICS)	Kincardine 2011	Kincardine 2016	Net (+/-)
<b>Total</b>	<b>5900</b>	<b>5685</b>	<b>-215</b>
Industry - NAICS2012 - not applicable	80	70	-10
11 Agriculture, forestry, fishing, and hunting	370	325	-45
21 Mining, quarrying, and oil and gas extraction	0	30	30
22 Utilities	1620	1,400	-220
23 Construction	345	435	90
31-33 Manufacturing	145	220	75
41 Wholesale trade	105	80	-25
44-45 Retail trade	720	605	-115
48-49 Transportation and warehousing	85	100	15
51 Information and cultural industries	110	105	-5
52 Finance and insurance	80	130	50
53 Real estate and rental and leasing	65	85	20
54 Professional, scientific and technical services	305	255	-50
55 Management of companies and enterprises	0	0	0
56 Administrative and support, waste management and remediation services	170	120	-50
61 Educational services	330	255	-75
62 Health care and social assistance	455	570	115
71 Arts, entertainment and recreation	75	50	-25
72 Accommodation and food services	490	400	-90
81 Other services (except public administration)	190	235	45
91 Public administration	165	220	55

Source: Statistics Canada; 2016 Census Profile

Looking comparatively at the province, Kincardine has higher concentrations of employment in agriculture, forestry, fishing and mining and utilities. While there is a considerable concentration in utilities, it seems to be at the expense of several sectors including finance, public administration and manufacturing, among others. This concentration in utilities seems to indicate that the economy lacks some of the diversity that is found more generally in the economy of the province.



**Figure 18: Employed Labour Force by Industry, Percentage of Labour Force**



Source: Statistics Canada; 2016 Census Profile.

The employment numbers and breakdown by industry provide valuable insight and can be taken into consideration when using other analytical tools that allow for an assessment of industry competitiveness relative to the province. This comparative analysis can help in the understanding of what industries make sense to leverage as strengths or to monitor for potential weaknesses.

A location quotient (LQ) analysis explains which industries employ a competitively higher proportion of people than the province. A score of 1.25 or greater represents a sector of relative strength, a score between 0.75 and 1.25 represents a sector that is on par with the province (1.0 represents perfect parity), and a score below 0.75 represents a sector of comparative weakness. Also pertinent are the trends over time and their direction, which indicate that potential opportunities or threats need to be addressed:



- Growing – Continue to build on the momentum and consider supply-chain gaps to grow related sectors
- Stable – Continue to monitor, encourage investment attraction and business retention and expansion
- Declining – Focus on business retention for existing businesses and monitor broader market trends and potential threats to local businesses. Intervention is necessary.

Based on the above considerations, the following observations emerge from the data in the figure below:

- Agriculture, forestry, fishing, and hunting is an industry of competitive strength for Kincardine with an LQ of 4.00. This high LQ, despite a slight decrease of 0.25, indicates that this is an important area of strength for Kincardine.
- Utilities is an area of exceptional strength for Kincardine with an LQ of 34.61. The strength of the sector indicates that this is an area where Kincardine is a leader in the province.
- Mining, quarrying, and oil and gas extraction have an LQ of 1.17 which indicates relative parity with the province. However, this industry had an increase of 1.17 of LQ from 2011 to 2016 which indicates that the sector is gaining some local strength when compared to the fact that it did not register an LQ in 2011.
- A total of 10 industries registered low LQ figures when compared to the province. Wholesale trade, warehousing and transportation, manufacturing, administrative and support, waste management and remediation services and arts, entertainment, and recreation all registered an LQ of less than 0.50 indicating industries with a great deal of competitiveness weakness.
- Management of companies and enterprises did not register an LQ with 0.00 for both 2016 and 2011, which indicates that there is an imperceptible presence in the community.



**Figure 19: Employment Location Quotients – Concentration of Employed Labour Force by Industry**

Industry (NAICS)	LQ 2016	Strength	Change	Trend
<b>11 Agriculture, forestry, fishing, and hunting</b>	4.00	High	-0.25	Declining
<b>21 Mining, quarrying, and oil and gas extraction</b>	1.17	Moderate	1.17	Growing
<b>22 Utilities</b>	34.61	High	1.56	Growing
<b>23 Construction</b>	1.15	Moderate	0.19	Growing
<b>31-33 Manufacturing</b>	0.40	Low	0.16	Growing
<b>41 Wholesale trade</b>	0.37	Low	-0.03	Declining
<b>44-45 Retail trade</b>	0.97	Moderate	-0.15	Declining
<b>48-49 Transportation and warehousing</b>	0.38	Low	0.06	Growing
<b>51 Information and cultural industries</b>	0.75	Moderate	0.03	Growing
<b>52 Finance and insurance</b>	0.43	Low	0.17	Growing
<b>53 Real estate and rental and leasing</b>	0.74	Moderate	0.18	Growing
<b>54 Professional, scientific and technical services</b>	0.56	Low	-0.13	Declining
<b>55 Management of companies and enterprises</b>	0.00	Low	0.00	No change
<b>56 Administrative and support, waste management and remediation services</b>	0.45	Low	-0.19	Declining
<b>61 Educational services</b>	0.61	Low	-0.16	Declining
<b>62 Health care and social assistance</b>	0.95	Moderate	0.18	Growing
<b>71 Arts, entertainment and recreation</b>	0.43	Low	-0.18	Declining
<b>72 Accommodation and food services</b>	1.05	Moderate	-0.31	Declining
<b>81 Other services (except public administration)</b>	0.99	Moderate	0.25	Growing
<b>91 Public administration</b>	0.66	Low	0.25	Growing

Source: Statistics Canada, National Household Survey, 2011; Census Profile, 2016. Adapted by MDB Insight.





Figure 21 presents the results of another analytical tool called a **shift-share analysis**. The shift-share articulates the factors which drive changes in employment through three primary considerations. **Reference Area Growth Effect:** The impact that changes in the overall broader economy at the provincial level have had on local employment in a given sector, leading to an increase or decrease in local employment.

- **Industrial Mix Effect:** The impact that changes among different industries of the economy have had on local employment in a given sector, leading to an increase or decrease in local employment).
- **Differential Shift:** The impact that local factors have had on increases or decreases in local employment (i.e., changes that cannot be explained by those in the reference area growth effect or industrial mix effect).

The data below indicates the following:

- Overall, industrial drivers have been the largest contributor to decreased employment in Kincardine. Losses in employment in utilities, manufacturing, information, and cultural industries, arts, entertainment and recreation, wholesale trade, other services (except public administration), and public administration have driven the overall decrease in jobs.
- Accommodation and food services (-161) and retail trade (-146) both saw a significant differential shift numbers indicating a decrease in the number of jobs. These large differential shifts are due to local factors and not reflective of the overall industry growth/decline trend. There was an overall decline of 205 jobs between 2011 and 2016.
- Professional, scientific, and technical services (-84) and educational service (-94) also indicated a significant differential shift.
- Healthcare, manufacturing, and public administration registered the highest differential shifts in any industry.



**Figure 20: Municipality of Kincardine Shift Share Analysis**

North American Industry Classification System	Area Growth Effect	Industrial Mix Effect	Differential Shift	Total
Agriculture, forestry, fishing and hunting	16	-13	-48	-45
Mining and oil and gas extraction	0	0	30	30
Utilities	70	-247	-43	-220
Construction	15	34	41	90
Manufacturing	6	-9	78	75
Wholesale trade	5	-16	-13	-25
Retail trade	31	0	-146	-115
Transportation and warehousing	4	2	9	15
Information and cultural industries	5	-6	-4	-5
Finance and insurance	3	0	46	50
Real estate and rental and leasing	3	2	15	20
Professional, scientific and technical services	13	21	-84	-50
Management of companies and enterprises	0	0	0	0
Administrative and support, waste management and remediation services	7	9	-66	-50
Educational services	14	5	-94	-75
Health care and social assistance	20	21	74	115
Arts, entertainment and recreation	3	-2	-27	-25
Accommodation and food services	21	50	-161	-90
Other services (except public administration)	8	-8	45	45
Public administration	7	-23	70	55
<b>Total</b>	<b>253</b>	<b>-181</b>	<b>- 277</b>	<b>- 205</b>

Source: Statistics Canada; 2016 Census Profile. Adapted by MDB Insight.



## 2.8 Commuting Patterns

Commuting patterns identify the shifts in the labour force as people travel from a place of residence to a place of work. The next three figures contribute to an understanding of the commuting patterns of the region. These measurements apply only to people that commute to a usual place of work, whether it be a factory, school, store, or other brick and mortar location, including a home office. It does not apply to commuters that do not have a usually fixed address, such as seasonal labour associated with certain sectors (e.g., agriculture), or construction (where the site changes for each new construct).

Kincardine has a much higher proportion of people that both live and work in the same community (i.e., “commute within census sub-division of residence”), at 80.4% than Bruce County (46%) and Ontario (58%).

**Figure 21: Commuting Destination for Employed Labour Force**

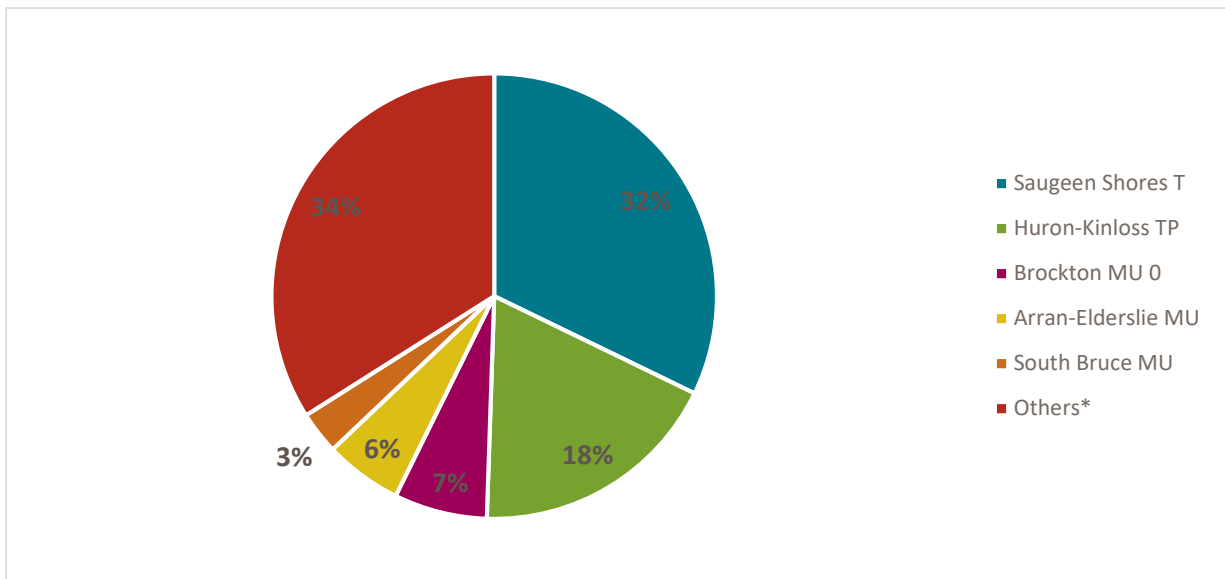
Commuting destination	Kincardine	Bruce County	Ontario
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
Commute within census subdivision (CSD) of residence	80.4%	46%	58%
Commute to a different census subdivision (CSD) within census division (CD) of residence	12.5%	29%	16%
Commute to a different census subdivision (CSD) and census division (CD) within province or territory of residence	6.5%	25%	25%
Commute to a different province or territory	0.7%	0%	1%

Source: Statistics Canada; 2016 Census Profile.

The next two figures indicate the workforce imported to and exported from Kincardine. Regarding the imported workforce, 34% of the people that commute to Kincardine for work come from census subdivisions, not immediately surrounding the community. Among the immediate surrounding communities, Saugeen Shores provides the greatest commuter population at 32%, followed by Huron-Kinloss at 18%.



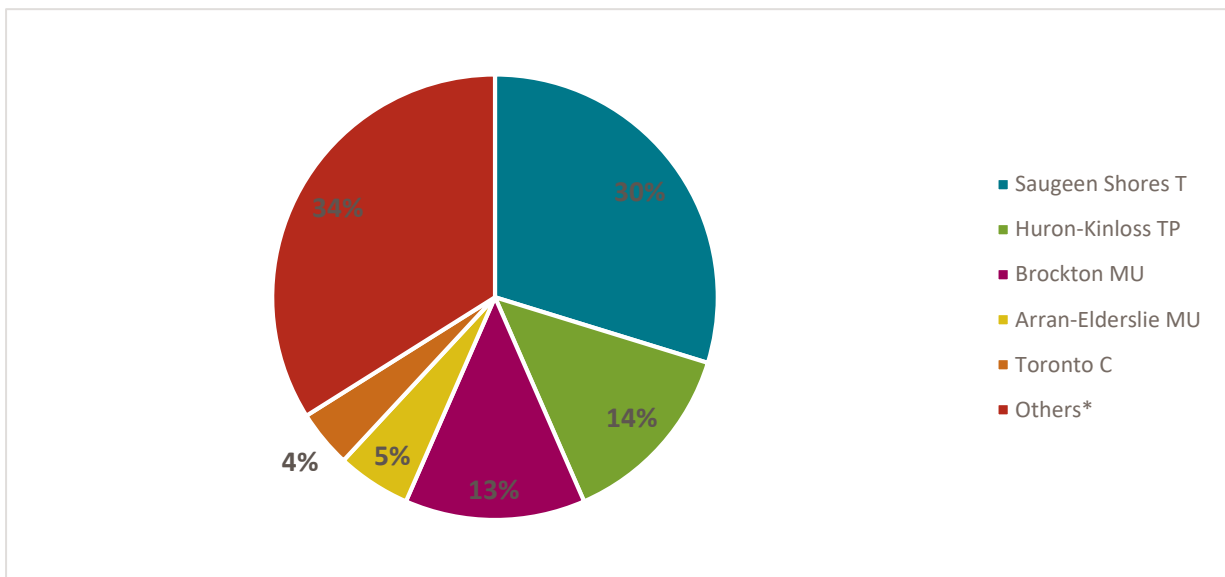
**Figure 22: Workforce Imported to Kincardine**



Source: Statistics Canada; Commuting Flows 2016, Table No. 98-400-X2016325.

Turning to those that live in Kincardine, 34% of the population that commutes out of Kincardine commutes to areas outside of the immediate census subdivisions. Almost one-third of the commuting population (30%) commutes to Saugeen Shores for work.

**Figure 23: Workforce Exported from Kincardine**



Source: Statistics Canada; Commuting Flows 2016, Table No. 98-400-X2016325.



## 2.9 Business Counts

Statistics Canada's Canadian Business Counts provides a record of business establishments by industry sector and size. This data is collected from the Canadian Revenue Agency (CRA).

The Canadian Business Counts data records business counts as either "Without Employees" or "With Employees." The establishments in the "Without Employees" category include the self-employed (i.e., those who do not maintain an employee payroll, but may have a workforce consisting of contracted workers, family members or business owners). It should be noted that the Canadian Business Counts data use the Canada Revenue Agency as a primary resource in establishment counts; therefore, businesses without a business number or indicating annual sales less than \$30,000 are not included.

Those businesses with employees are further divided into group sizes. The largest group is 200 employees or more. Typically, Canadian Business Counts have a 200 to 499 group and 500 employees or more group, but these have been combined into 200+ to save on space and because there were only three businesses in that group. The results are presented in the figure below.





**Figure 24: Business Counts in Kincardine by Industry and Number of Employees**

Industry (NAICS)	Total	Ind.	Subtotal	1-4	5-9	10-19	20-49	50-99	100-199	200+
<b>Total</b>	<b>1419</b>	<b>1042</b>	<b>377</b>	<b>212</b>	<b>70</b>	<b>46</b>	<b>32</b>	<b>9</b>	<b>5</b>	<b>3</b>
Unclassified	126	94	32	26	2	3	1	0	0	0
Sub-total, classified	1293	948	345	186	68	43	31	9	5	3
11 - Agriculture, forestry, fishing and hunting	268	235	33	25	5	2	0	0	1	0
21 - Mining and oil and gas extraction	0	0	0	0	0	0	0	0	0	0
22 - Utilities	15	13	2	0	0	0	0	0	1	1
23 - Construction	107	77	30	15	8	4	3	0	0	0
31-33 - Manufacturing	19	14	5	0	2	0	3	0	0	0
41 - Wholesale trade	22	12	10	5	2	2	0	0	1	0
44-45 - Retail trade	90	43	47	18	12	8	7	1	1	0
48-49 - Transportation and warehousing	25	21	4	2	1	1	0	0	0	0
51 - Information and cultural industries	12	6	6	2	3	0	0	1	0	0
52 - Finance and insurance	48	36	12	2	6	3	1	0	0	0
53 - Real estate and rental and leasing	204	193	11	8	1	2	0	0	0	0
54 - Professional, scientific and technical services	192	136	56	47	5	2	1	0	0	1
55 - Management of companies and enterprises	6	5	1	0	0	0	0	1	0	0
56 - Administrative and support, waste management and remediation services	39	26	13	8	2	1	1	1	0	0
61 - Educational services	16	12	4	2	1	0	1	0	0	0
62 - Health care and social assistance	82	48	34	18	3	5	6	1	1	0
71 - Arts, entertainment and recreation	15	9	6	2	1	2	1	0	0	0
72 - Accommodation and food services	46	15	31	7	5	8	7	4	0	0
81 - Other services (except public administration)	86	47	39	25	11	3	0	0	0	0
91 - Public administration	1	0	1	0	0	0	0	0	0	1

Source: Statistics Canada; Canadian Business Counts December 2018. Adapted by MDB Insight.

Looking at business counts as well as employee size, the analysis has found that:

- Three companies registered over 200 employees. These businesses were in the utilities, professional, scientific and technical and public administration categories.
- Although it was the industry with the second the greatest number of businesses (268), agriculture, forestry, fishing, and hunting had a high proportion of firms without employees which is indicative of the nature of farm operations.
- The other largest sectors without employees are real estate and rental and leasing (204 businesses), professional, scientific and technical services (192)

Data on the number of enterprises allow for location quotient analysis to determine which sectors Kincardine may have a competitive advantage based on the concentration of businesses. Industries with 1.25 or greater indicating strength, 0.75 to 1.25 indicating parity with the province, and below 0.75 indicating weakness. Statistics Canada advises against comparing Canadian Business Counts over time. As such, the results represent a snapshot in time for the competitiveness of different sectors compared to the overall province. Finally, the results focus on enterprises with employees. The following observations emerge from the data:

- Key leading sectors include agriculture, forestry, fishing and hunting (LQ 4.70) and utilities (4.91)
- Accommodation and food services are an area of moderate strength (1.30)
- transportation and warehousing (LQ 1.58), mining and oil and gas (1.55), agriculture, forestry, fishing, and hunting (1.5), and accommodation and food services (1.27).
- Key areas to consider for growth include manufacturing (0.31), wholesale trade (0.57), and management of companies and enterprises (0.47)
- Transportation and warehousing (0.17) and mining and oil and gas extraction (0.00) demonstrated extremely low LQ numbers but are largely contingent on location and proximity to resources and are not likely to be pursued.

**Figure 25: Business Counts Location Quotients –Concentration of Businesses with Employees by Industry Kincardine**

Industry (NAICS)	LQ 2018	Strength
11 - Agriculture, forestry, fishing and hunting	4.70	High
21 - Mining and oil and gas extraction	0.00	Low
22 - Utilities	4.91	High
23 - Construction	0.76	Moderate
31-33 - Manufacturing	0.31	Low
41 - Wholesale trade	0.57	Low
44-45 - Retail trade	1.13	Moderate
48-49 - Transportation and warehousing	0.17	Low
51 - Information and cultural industries	0.99	Moderate
52 - Finance and insurance	0.86	Moderate
53 - Real estate and rental and leasing	0.73	Low
54 - Professional, scientific and technical services	1.12	Moderate
55 - Management of companies and enterprises	0.47	Low
56 - Administrative and support, waste management and remediation services	0.81	Moderate
61 - Educational services	0.88	Moderate
62 - Health care and social assistance	0.96	Moderate
71 - Arts, entertainment and recreation	1.20	Moderate
72 - Accommodation and food services	1.30	High
81 - Other services (except public administration)	1.24	Moderate
91 - Public administration	0.97	Moderate

Source: Statistics Canada; Canadian Business Counts December 2017. Adapted by MDB Insight.

## 2.10 Key and Emerging Sector Analysis

### 2.10.1 Nuclear Supply Chain

Kincardine is fortunate to be home to the Bruce Nuclear Generating Station. The 6,430MW nuclear facility is owned by Ontario Power Generation (OPG) and operated by Bruce Power. As the second-largest nuclear plant in the world, the plant's employment base and spinoff activity have a major economic impact.

With the promise of major component refurbishment on all reactors over the next few decades, Kincardine is already seeing supply chain companies like engineers and technical firms move to the area to bid on contracts to support the plant.

Nuclear supplier procurement is heavily regulated, as is the operation of nuclear power sites. Bruce Power uses a stringent prequalification procurement system and encourages all its suppliers to open local offices within host communities.

Typically, the supply chain for operation and maintenance of the nuclear power plant varies, but may include:

- Health and safety, security, health physics, environmental, quality assurance
- Operation and maintenance labour
- Spares and equipment
- Support services (training, engineering, project, finance, legal, facilities management, transport)
- Waste management
- Supporting infrastructure such as waste management facilities

Bruce Power's relationships with its suppliers are managed with an internal online platform system that is also used by Ontario Power Generation, Hydro Ottawa, and Toronto Hydro.

The Nuclear Industry Investment Strategy (2016), a joint effort between Bruce County and Bruce Power, includes as its first goal 'Expand the regional supplier network to support Bruce Power's long-term needs.' An activity within that goal includes developing supplier targeted promotional material and an outreach plan.

To continue to benefit from nuclear supply chain activity, engagement, and Kincardine should maintain outreach with supply chain businesses.

### 2.10.2 Cannabis Sector

Since Cannabis became legal in October of 2018, Canada has received more than \$186 million in taxes from cannabis sales, of which 71% corresponded to provincial revenue.

Some examples of businesses operating within the cannabis industry include:

- **Agriculture technology:** Businesses that support the innovation and development of equipment required to cultivate cannabis, such as automated fertilizer systems, greenhouse technologies and improved lighting systems.
- **Ancillary products and services:** Businesses that offer products that complement the cannabis industry as a whole, which can include products like cannabis breathalyzer to laboratories that test

cannabis products. This also includes companies that provide insurance to cultivators as well as those that create consumer packaging for products.

- **Biotechnology:** Businesses that focus on the pharmaceutical applications of cannabis by developing treatments to target illnesses and diseases.
- **Consulting services:** Businesses that respond to the complexity of rules and regulations around cannabis between different jurisdictions. They may provide services to assist with licensing, zoning, or advising on operational processes.
- **Consumption devices:** Businesses that create products that people use to consume cannabis.
- **Cultivation and retail:** Businesses that grow and sell cannabis and are often the types of businesses that most people think of when discussing the cannabis industry.
- **Cannabis products and extracts:** Businesses that sell cannabidiol products, edibles, topicals, drinks, and other products.
- **Holding companies:** Businesses that typically own a considerable number of voting shares in a variety of cannabis companies, allowing them to influence the management and affairs of the companies held.
- **Industrial hemp:** Businesses that provide products using industrial hemp, which is different than cannabis and may have numerous applications and uses, including creating consumer products like paper and clothing, as well as building materials, fuel, and foods.
- **Organic farms:** Businesses that provide organically grown cannabis to other companies or sell to consumers directly, relying on the increasing demand for organic products and services to drive the business's growth.<sup>4</sup>

### 2.10.3 Tourism

Tourism is a key market sector for the Municipality of Kincardine. According to Bruce County, there were 2.5 million visitors to the County and an economic impact estimated to be \$299.1 million. In addition to the more conventional tourist travelers, tourists are increasingly seeking more authentic tourism experiences that are off the beaten path and allow them to engage with the local community and connect with its natural and cultural flavour. In addition to the core community assets, support infrastructure such as roofed accommodation, unique rural markets, restaurants, entertainment, destination retail, visitor information, and wayfinding is important in creating a desirable image for a day trip and promoting overnight stays. Improved accessibility through pedestrian and cycle-way linkages, signage, visitor-friendly navigation options, partnerships with key regional attractions as well as transport that connects the village main streets to the urban core in Kincardine is also important. Support for rural tourism and enabling access are vital to developing strength in this sector and a strong tourism brand for the area. The example of Norfolk County tourism is provided to highlight some initiatives that have been successful in developing alternate forms of roofed accommodation and supporting destination development in predominantly agricultural areas.

Similar to Kincardine, Norfolk County also benefits from its location along the shores of the Great Lakes. Norfolk County, like Kincardine, was traditionally an agricultural community and was once a major contributor to the Canadian tobacco industry. Norfolk prides itself on this agricultural diversity and is promoting the unique array of alternative crops (e.g., ginseng) and vegetables, fruits, and more with the

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<sup>4</sup> <https://www.getsmarteraboutmoney.ca/invest/investment-products/investing-cannabis-industry/>



brand “Ontario’s Garden.”

Tourism in Norfolk County is administered by Norfolk County Tourism & Economic Development ([norfolktourism.ca](http://norfolktourism.ca)) and is considered a thought leader in the rural tourism industry and has implemented many tourism product development initiatives and marketing campaigns. Norfolk County’s major tourism products include coastal towns, beaches and marinas, farm markets, outdoor recreation through birding, cycling, hiking, sport fishing/angling, Long Point Biosphere Reserve, and the Norfolk county fair/fairgrounds.

Norfolk County has a dedicated Product Development Plan that is focused on product, service, infrastructure with an emphasis on regional collaboration, integration with Region Tourism Organization 1 (RTO1), and private-sector and community buy-in. As part of industry outreach, the department conducts an annual symposium to expose businesses to trends and opportunities in tourism, workshops on an ad-hoc basis on various priority topics, special projects, e.g., Agri-Tourism Gap Analysis and developing the capacity of businesses and non-profits. Norfolk County also offers incentives to tourism operators including the Façade Improvement Program, Tax Increment Financing Program and Exemptions on Development Charges for roofed accommodation through a Community Improvement Plan (CIP). The innovative aspect of the CIP is that it has provisions for urban zones as well as its hamlets, agricultural and lakeshore areas. As the definition of what tourism expands and as visitors actively look for new and unique experiences, looking at sub-sectors that make up an accurate reflection of tourist activity must also be expanded.

## 3. Document Review

### 3.1 Kincardine Official Plan Initial Background Report Dec 2018

**Purpose:** This report provides an initial review of the Official Plan for the Municipality of Kincardine, which was adopted by Council in 2006, approved by Bruce County in 2007, and received final approval from the Ontario Municipal Board (OMB) in 2009.

**Key Takeaways and Economic Considerations:**

- The plan envisions a 20-year planning horizon
- The Official Plan provides guidance related to the three settlement areas of the Municipality: Town of Kincardine, Village of Tiverton, and Lakeshore Area, including Inverhuron.
- Areas not identified within the Official Plan's settlement areas are governed by the policies of the Bruce County Official Plan.
- The municipality contains more residential lands than are projected to be needed over the 20-year planning horizon.
- It is projected that a total of 1,012 households with an estimated population of 1,966 persons are required through to 2039, and the report found that there is sufficient land allocated within approved Plans of Subdivision to accommodate approximately 1,000 units.
- The consultation process uncovered several topics for further investigation, including permitting mixed-use within employment lands (i.e., residential) within commercial and/or office buildings located within employment areas within Kincardine, permission for office uses adjacent to downtown including in large historic homes and policies related to cannabis sales outlets.

### 3.2 Bruce County Economic Development for You. Economic Development Strategy 2017-2021

**Purpose:** This plan outlines the strategic direction for Bruce County's Economic Development and Tourism department over the five years.

**Key Takeaways and Economic Considerations:**

- The plan outlines the role of the county and emphasizes that municipalities will own their community brands
- Bruce County will continue to play a role in business attraction and provide to support their local partners
- Business to Bruce programming provides grants to start and showcase a business and business support services including workshops and seminars
- The Spruce the Bruce program offers grants for community improvement and signage
- Explore the Bruce provides marketing and promotion of tourism businesses
- Targeted sectors for growth include tourism, agriculture, and energy

### 3.3 Bruce County Economic Impact of Tourism Study 2018

Purpose: Bruce County Economic Development conducted over 500 surveys of our visitors and 170 local tourism-related businesses across Bruce County including the Municipality of Kincardine. The results helped develop a baseline of data and information to inform further ongoing data collection.

#### **Key Takeaways and Economic Considerations:**

- There were 2.5 million visitors to Bruce County
- Over 90% were likely to visit again
- The economic impact in Bruce County was estimated to be \$299.1 million
- Food and beverage spending represented the largest spending category at \$115.3 million
- Transportation (\$58.5 million) and accommodation (\$51.7 million) each generated over \$50 million in visitor spending
- Shopping generated \$42.6 million in local spending recreation generation \$31.0 million
- The economic impact included \$174 million in GDP (121.9 direct, 21.3 indirect, 30.8 induced)
- Labour income was found to be \$95.4 million (\$62.9 million direct, \$13.9 million indirect, and \$18.6 million induced)
- Tourism was estimated to contribute 2,333 local jobs including 1905 direct, 208 indirect and 221 induced
- The fiscal impact in millions was estimated to be \$57.3 million in direct taxes (\$22.8 federal, \$32.5 provincial, \$2.1 municipal) and \$77.3 in total taxes (\$32.5 federal, \$39.6 provincial and \$5.1 municipal)
- Kincardine businesses represented 12% of the total sample
- 40% of businesses responded that peak season ended in September, 29% in August and 17% in October
- The peak season to off-season visitors was estimated to drop from 1224 to 253 and the mean spending amount reported was by businesses was \$131
- 54% of visitors stayed overnight with 30% staying in a home and the remainder in commercial accommodation
- Visitors to Bruce County tend to skew older (45% age 55 and older)
- Kincardine was the 3<sup>rd</sup> most visited municipality in Bruce County after Northern Bruce Peninsula and Saugeen Shores
- Kincardine had 57% of visitors stay overnight which was the same as Saugeen Shores and only less than Northern Bruce Peninsula at 60%
- 52% of visitors to Kincardine would recommend Bruce County to others which were second only to South Bruce Peninsula among Bruce County municipalities

of the study will be beneficial for potential investors and entrepreneurs as it will support them in their decision to open a business in Bruce County with accurate and meaningful data. This year, the results will be used as a baseline to be measured against on an annual basis. The goal of this project is to develop a framework for the collection and analysis of tourism data that leverages existing collection

sources, addresses current gaps, builds a baseline of information, reduces duplication of efforts, and better informs business and industry supports for prospective business growth opportunities.

### 3.4 Municipality of Kincardine, Kincardine Business Park Servicing Master Plan, 2017

**Purpose:** The plan identifies strategies for the development and servicing of the Kincardine Business Park located on Highway 21 and Highway 9.

**Key Takeaways and Economic Considerations:**

- There is approximately 52 ha of land available for development, and current zoning policies permit highway commercial, large format retail and light industrial land uses
- The plan identifies the significant potential for commercial and light industrial development contingent on the availability of municipal services
- The plan recommends water, sanitary, transportation and stormwater services to the Business Park
- Updates to the Official Plan for the Municipality of Kincardine should reference the proposed level of service

### 3.5 Kincardine Business Survey, 2017

**Purpose:** The Business Survey Report was conducted for the Bruce Community Futures Development Corporation in partnership with the Kincardine BIA, Kincardine Chamber of Commerce, and the Municipality of Kincardine to understand the business climate. A total of 123 businesses participated.

**Key Takeaways and Economic Considerations:**

- Business owner/operators had a generally positive outlook (83%) for their business
- Businesses were interested in seeing higher levels of support from the municipality regarding business development and tourism
- Businesses did not report widespread workforce challenges
- The report highlights the need for a shared vision and an overarching plan for economic development
- Businesses identified the issue with businesses locating outside of the downtown and potential challenges to sustainability
- Businesses highlighted the need for waterfront development and a four seasons' tourism strategy

### 3.6 Toolkit for Business, Spruce the Bruce Kincardine Edition

**Purpose:** The Toolkit was developed in partnership with the County to guide businesses on how they can support the overall tourism brand development as well as improve their own business

**Key Takeaways and Economic Considerations:**

- The program provides policy research, action plan development, design services and grants for downtown improvement

- Kincardine has a successful Scottish brand story that businesses are encouraged to embrace and offer complementary features and products in their establishments
- The program offers grants for façade improvement, signage
- The ‘Pants Optional’ campaign was launched to add humour and enhance the Scottish brand development

### 3.7 Arts, Culture and Heritage Plan, Municipality of Kincardine, 2015

**Purpose:** This document outlines the immediate and longer-term goals of the Municipality in supporting the Arts, Culture, and Heritage sector. The plan outlines Phase 1 and Phase 2 processes for the Municipal Class EA.

#### **Key Takeaways and Economic Considerations:**

- Goals of the plan include to:
  - Establish sustainable Arts, Culture and Heritage funding in the municipal budget;
  - Improve awareness of Arts, Culture and Heritage activities, facilities and programs;
  - Strengthen Arts, Culture and Heritage organizations by improving participation of citizens, the involvement of the Municipality and collaboration among existing Arts, Culture and Heritage groups;
  - Maintain & preserve built heritage in the Municipality of Kincardine;
  - Make Municipality of Kincardine an Arts, Culture, and Heritage destination;
  - Expand youth opportunities for Arts, Culture and Heritage participation
  - Recognize and celebrate diversity within the community and
  - Continue to preserve natural Heritage
- The plan references successes to date including establishing an Arts, Culture and Heritage Policy Chair as well as a position on the Community Investment Grants Evaluation Team
- Other successes include the development of a public music studio partnership
- The plan envisions dedicated municipal resources to support the sector including staffing, an endowment fund and dedicated funding through the budgetary process

### 3.8 Municipality of Kincardine Integrated Community Sustainability Plan, 2012

**Purpose:** This document outlines the values and key assets of the community and provided a roadmap for the municipal corporation

#### **Key Takeaways and Economic Considerations:**

- The previous vision for the Municipality was *“To be a community that enhances our quality of life in a sustainable manner.”*
- Four pillars of the Plan included Economy, Culture, Natural Environment and Society

- Action areas identified by the Plan included Innovation, economic diversity, health services, agricultural and tourism sector development
- Other action areas included the trail network, affordable housing strategy development, natural environment protection and culture, arts, and heritage planning
- The Values within the Community Sustainability Plan were:
  - Believe the Municipality of Kincardine is a special and sustainable place;
  - Commit to working together as Individuals, organizations, businesses, institutions, staff, and elected officials to move ahead with our agenda of sustainability;
  - Embrace a balance between economy, society, culture, and nature as equal driving forces for success;
  - Emphasize our need for sustainable and Informed decision-making at all levels; and
  - Will leave a legacy for future generations.
- Economic sectors that were explored through the plan include tourism, agriculture, the nuclear sector, knowledge-based industries, and arts and culture
- Downtown vibrancy was also highlighted as a goal of the plan under the economy pillar
- Municipal operations and community leadership was one of 14 areas explored and included a goal that *“The Corporation of the Municipality of Kincardine will demonstrate leadership in finance, governance, and sustainability, and will continue to apply creative, forward-thinking approaches to strengthening the local economy.”*
- Some of the other core areas identified through the plan were natural areas, environmental stewardship, smart growth, fostering community building and identity, Access and Affordability and diversity and inclusion

### 3.9 Community and Economic Development 2019 Workplan

**Purpose:** The work plan highlights the current operational activities of the economic development position within the municipality

**Key Takeaways and Economic Considerations:**

- Major goals within the workplan are highlighted under the categories of Business Development and Support, Nuclear Supply Chain Support, Residential and Workforce Support and Growth, Community Development Communications and Measurement
- The workplan outlines the specific activities that the EDO position supports including attendance at events, representation on committees, event organization, and communications content creation and marketing

### 3.10 Common Threads Analysis

The figure below presents a common threads matrix, showing the association between each theme relative to the documents it has been identified in via a series of checkmarks. A single checkmark (✓) indicates the document has some content relating to the theme, but it is not a primary focus of the document, while a double checkmark (✓✓) indicates there is a primary focus on the theme.



Document	Land Use and Infrastructure Development	Residential Growth	Marketing and Communications	Arts, Culture, Tourism	Economic Growth and Diversification	Sustainability
Kincardine Official Plan Initial Background Report Dec 2018	✓✓	✓✓			✓✓	✓
Bruce County Economic Development for You. Economic Development Strategy 2017-2021			✓✓	✓	✓✓	
Bruce County Economic Impact of Tourism Study 2018			✓✓	✓✓	✓✓	
Municipality of Kincardine, Kincardine Business Park Servicing Master Plan, 2017	✓✓	✓✓			✓	✓✓
Kincardine Business Survey, 2017			✓✓	✓✓	✓✓	
Toolkit for Business, Spruce the Bruce Kincardine Edition			✓✓	✓✓	✓✓	
Arts, Culture and Heritage Plan, Municipality of Kincardine, 2015		✓	✓✓	✓✓	✓	✓
Municipality of Kincardine Integrated Community Sustainability Plan, 2012	✓✓	✓✓	✓		✓	✓✓
Community and Economic Development 2019 Workplan	✓	✓	✓	✓✓	✓✓	





## 4. Consultation Report

### 4.1 Consultation Process

An important aspect of the Corporate Strategic Plan was engaging the community. The consultation process was designed to gather input and solicit feedback from the variety of stakeholders who make up the municipality of Kincardine. The figure below outlines the various engagement inputs.

**Figure 26: Consultation Process**



#### 4.1.1 Council and Staff Conversations

During September and October, a total of 11 individual interviews were conducted with members of Council and Senior Management. The individual interviews provided a confidential opportunity for key decision-makers and administration to reflect on the strengths and challenges of the municipal corporation as an organization serving the residents and businesses throughout the municipality of Kincardine. While there were several individual areas and department-specific issues or opportunities, there were some more universal themes that emerged with a bearing on corporate governance as a whole.

A summary table is provided in Figure 27. Individual responses were kept confidential.



**Figure 27: Summary of Staff and Council Interviews**

<b>Reflect on what you consider to be Kincardine's strengths.</b>		
Prosperous, high average annual income and low housing costs	High-quality lifestyle	Prominent for a smaller, rural municipality
The location along Lake Huron	Diversity of the population	Strong nuclear sector
Tourism	High standard of living	Strong agricultural community
Highly skilled workforce	Volunteer base	Returning tourist population coming back year after year
Prosperous community	Natural beauty	Lots of recreation options
Enthusiasm among leadership and Council	Talent within the organization	Active community
<b>What critical issues are top of mind?</b>		
Affordability for all residents	Ensuring we have the resources to keep up with growth	Staffing capacity and ability to meet the growing needs
Housing for residents	Infrastructure needs to meet growth	Lack of public awareness about what is being done
Not solely relying on the nuclear sector	Fluctuations in the economy that come from nuclear projects that often come in phases	Hearing about worker shortages among local businesses
Lack of retail offerings	The public perception that the municipality is risk-averse	Need for new technologies
Service levels have not kept up with needs	Neighbouring municipalities are currently better positioned	Environmental sustainability
<b>What role does the strategic plan in preparing the municipality for growth?</b>		
Help the Council and staff focus on priorities	Help the Council and administration understand their respective roles	Keep the Municipality focused on things they can control
Identify where we need to add capacity to meet our goals	Informs departmental business planning	Provide a common vision



One of the emerging themes from the interviews included the need to ensure that corporate resources were aligned with the needs of the growing community. As population growth driven by investments at Bruce Power start to become more prevalent in Kincardine, there is a desire to look at how the municipality currently operates and identify if there are more resources required to address the needs of the community better. To maximize the impact of investments in the nuclear sector and create the best possible development climate, there was an expressed desire to streamline development processes and cut red tape where possible. Traditional processes for meeting the needs of the development community may have been appropriate in lower growth periods but the MCR project and the potential for other nuclear and energy-related projects require the current alignment of corporate resources to be addressed and potentially re-aligned to enable growth best.

Council and Senior Management also highlighted the need for a unified vision across the municipality as a corporation but also among the various communities that make up the municipality of Kincardine. For Council and staff to effectively work together, there needs to be a cohesive vision that everyone within the organization can rally behind. The need for a unified vision also extends beyond just the corporation and the corporate strategic plan and should also be something that all residents of Kincardine's communities can see themselves reflected in.

#### 4.1.2 Stakeholder Interviews

Individual interviews were also conducted with stakeholders across the municipality and the larger region. These interviews included representatives of Bruce County, the BIAs, Bruce Power, education, and business leaders. The stakeholder interviews provided an opportunity for those outside of the corporation to reflect on the Municipality of Kincardine and provide their perspective on some of the strengths, challenges and opportunities they perceived that could be incorporated within the corporate strategic plan.

Stakeholders expressed their appreciation for the municipality and the collaborative approach that the municipality takes in working with partners across business, government, and community groups. There was an appreciation for the work being done by staff and the Council to move the needle and to make progress on several initiatives including economic development. There were some reservations expressed concerning the historical positions that the Council had taken or lack thereof. Several stakeholders referenced inertia or risk-averse attitude that had historically held the Municipality of Kincardine back and prevented some proactive initiatives that could have led to greater development and prosperity. Stakeholders expressed a desire to see the Council take bold actions to complement the strategic plan and to become a leader in the region.

A summary table is provided in Figure 28. Individual responses were kept confidential.



**Figure 28: Summary of Stakeholder Interviews**

<b>As a leader in our community, what do you see as the community's top three strengths?</b>		
Steady employment opportunities because of nuclear	The natural beauty of Kincardine, something they leverage while recruiting	Part of Bruce power value proposition
Steady agriculture base with labour base, good proximity to goods transport for markets.	Close to major cities	The downtown of Kincardine is a real jewel but bypass redirects traffic around it
Opportunity for people to stay in the area.	A safe and clean place to live	Hard-working, volunteer
High average income means support for local business; people are not as interested in working in low-income jobs	Has good services for a small town	Shopping, health care fitness facilities, grocery stores locally
<b>As a leader in our community, what do you see as the community's greatest challenges?</b>		
Available development land...behind the 8-ball due to previous approaches. Started later on development land, behind Port Elgin.  There is no action on this.	Need the funds to develop and need staffing to allow things to move and move fast enough for development.	Municipality can't keep up with developing lands due to lack of finances and staff
Having a qualified workforce to fill lower labour jobs is a challenge for agriculture.	Available infrastructure needs to be in place, lack of planning at the bottom end means huge capital costs to get where it should have been in the first place.	Hard to convince professionals to move out with spouses without the amenities (theatre



### 4.1.3 Community Survey

A community survey was circulated to the residents of the Municipality of Kincardine during October 2019. The survey asked residents questions about their perceptions of Kincardine, what they perceived its strengths to be, and what they felt were priorities that the Council should follow over the coming years. The results are below.

Figure 29 below shows that 93% of respondents to the community survey live within the municipal boundary of Kincardine, while the other 7% reside in neighbouring communities.

**Figure 29 Respondents' place of residence**

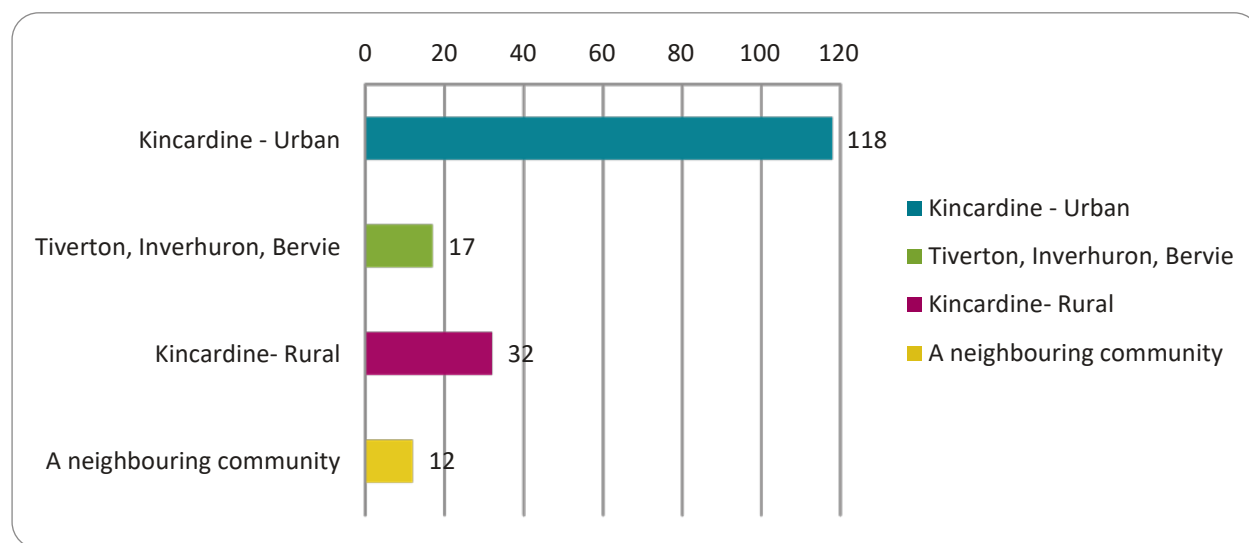
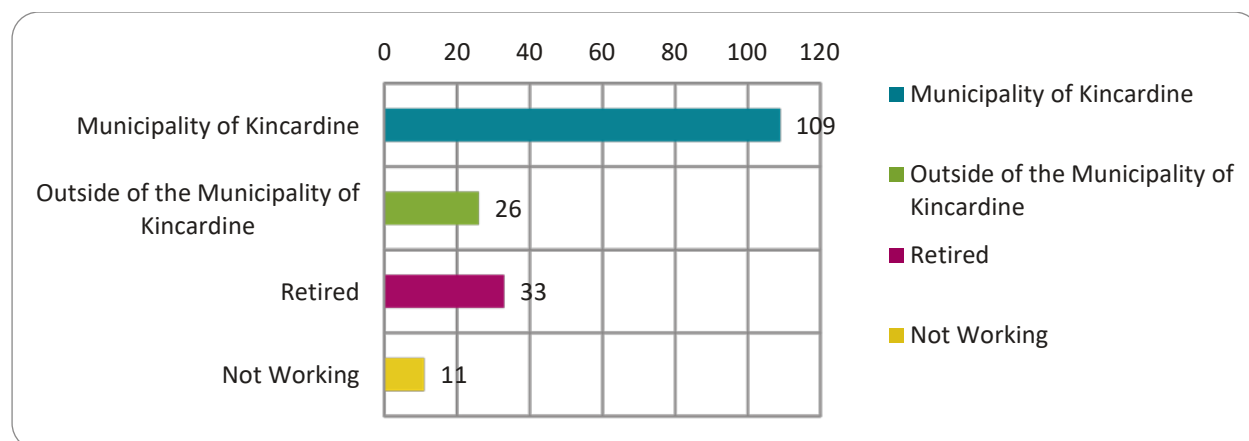


Figure 30 below shows that the majority of respondents to the survey work in Kincardine. Approximately 60% work within the Municipality of Kincardine.

**Figure 30 Respondents' place of work**





The demographic profile of the survey respondents was varied. Approximately 28% were in the 26-35 age range, which represented the largest age group of survey respondents. The next age group, 36-45, accounted for 21%, and the 56-65 accounted for another 21%.

Figure 31 Age range of respondents

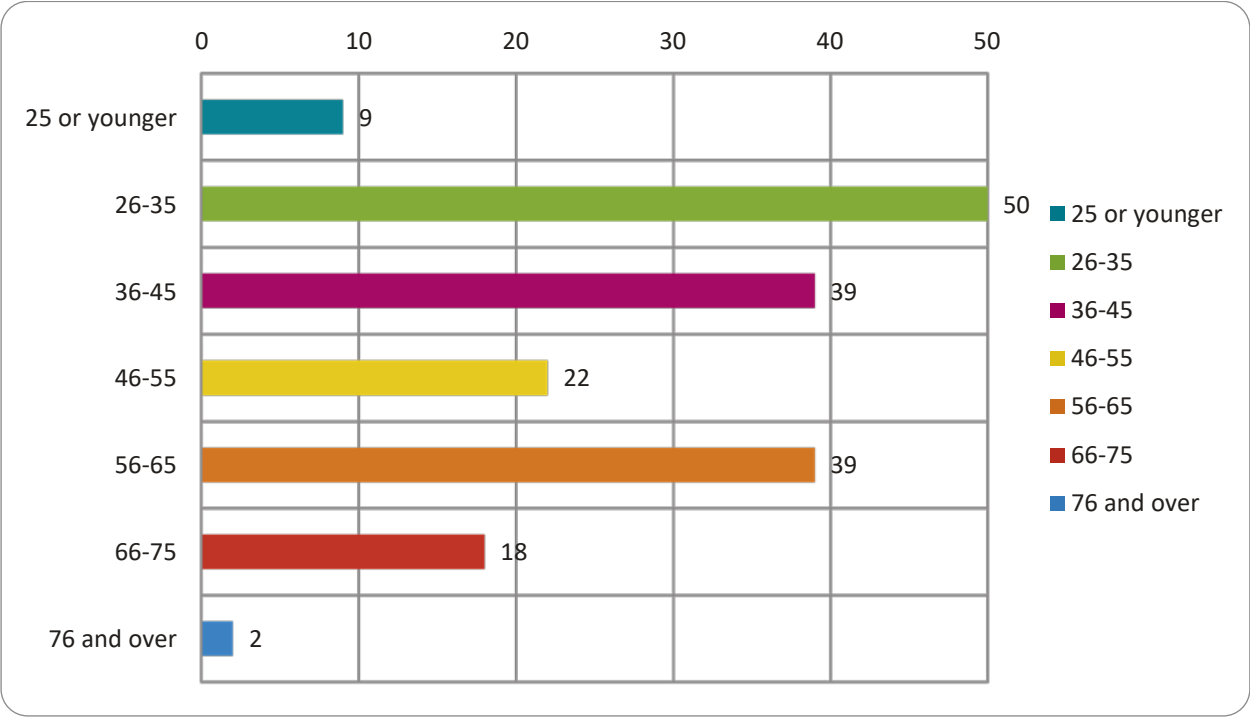
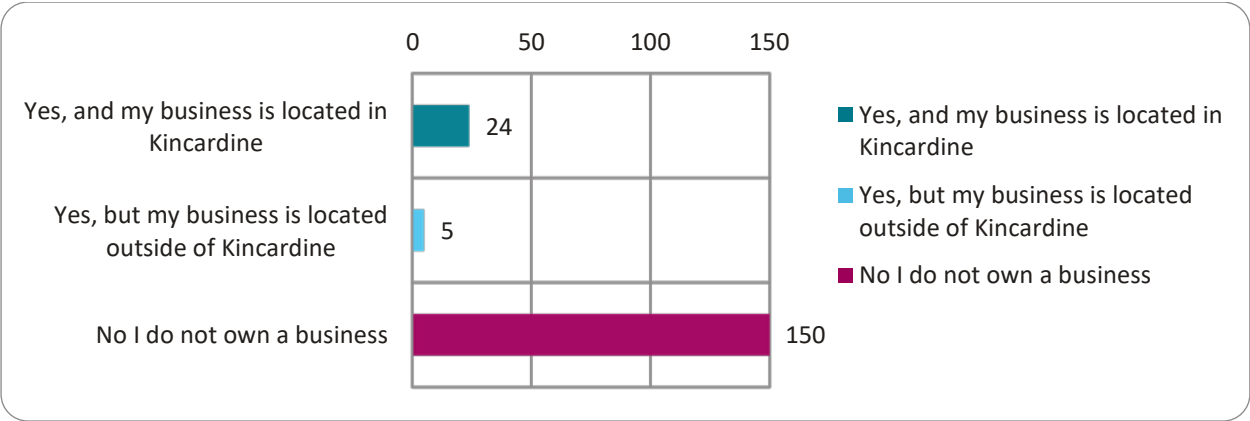


Figure 32 below shows that 29 respondents to the community survey were business owners or 16%. This means that 16% of community survey responses speak to not only Kincardine’s quality of life considerations but also reflect its strengths or challenges as a place to do business.

Figure 32 Business owners vs. non-business owners





In terms of what respondents felt made Kincardine a great place to live or work, 91 of them, or 50%, identified Kincardine's access to nature and Lake Huron as its top strength. Notably, the following top two reasons spoke to their ties with the community: 'My family is here,' and 'Born and raised here' represented 28% and 25% of responses respectively. These responses suggest that Kincardine's community is tightly knit. It also suggests a profile of survey respondents. It is unlikely, based on the popularity of those answers, that survey respondents were new to the community.

**Figure 33 What makes Kincardine a great place to live or work...select your top 2 reasons**

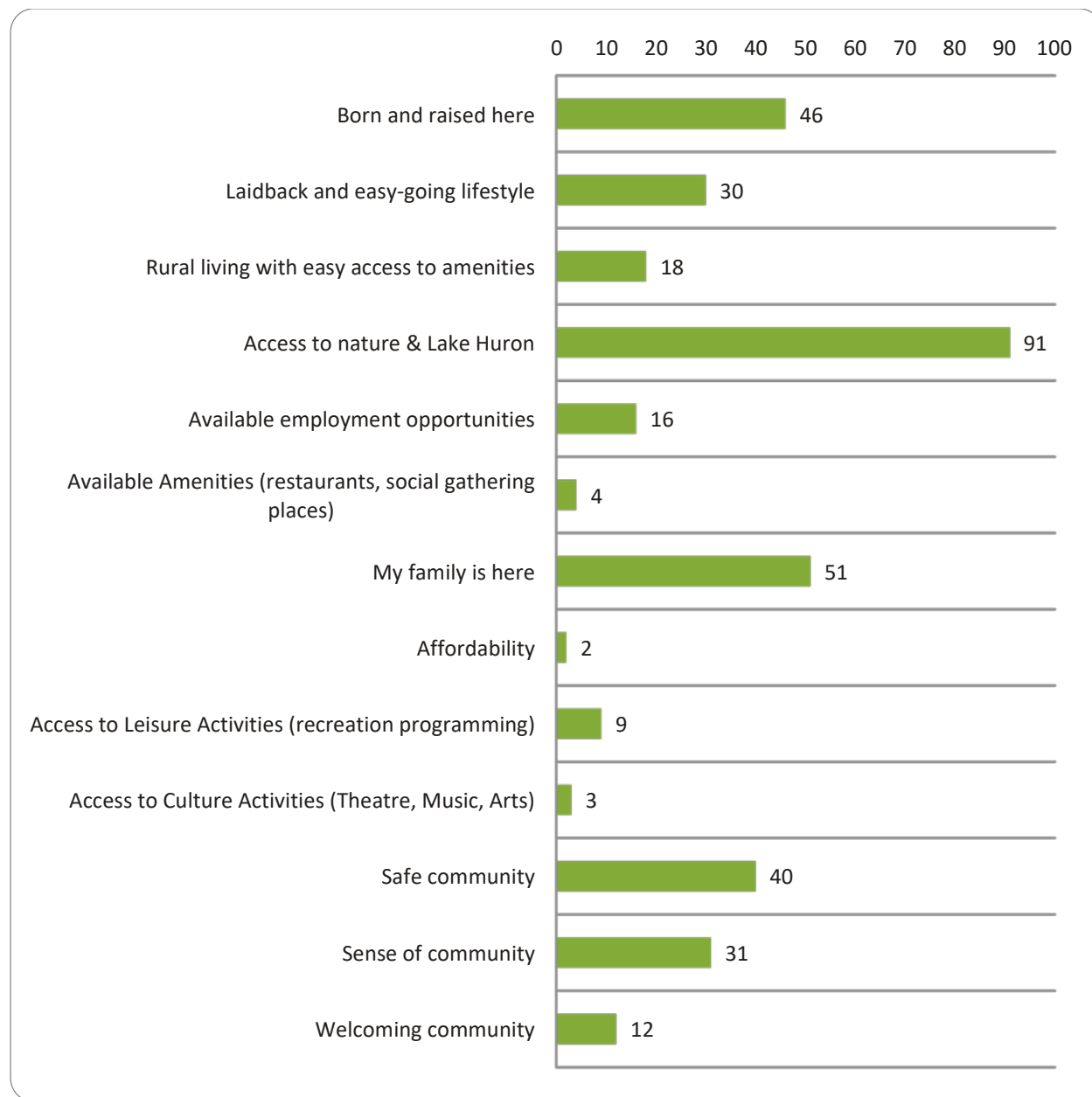




Figure 34 shows general satisfaction levels with Kincardine as a place to live. Combining Satisfied and Very Satisfied places the satisfaction level at 83%. A strong majority (99 out of 179) identified they were satisfied with Kincardine as a place to live.

**Figure 34 How do you generally feel about the Municipality of Kincardine as a place to live?**

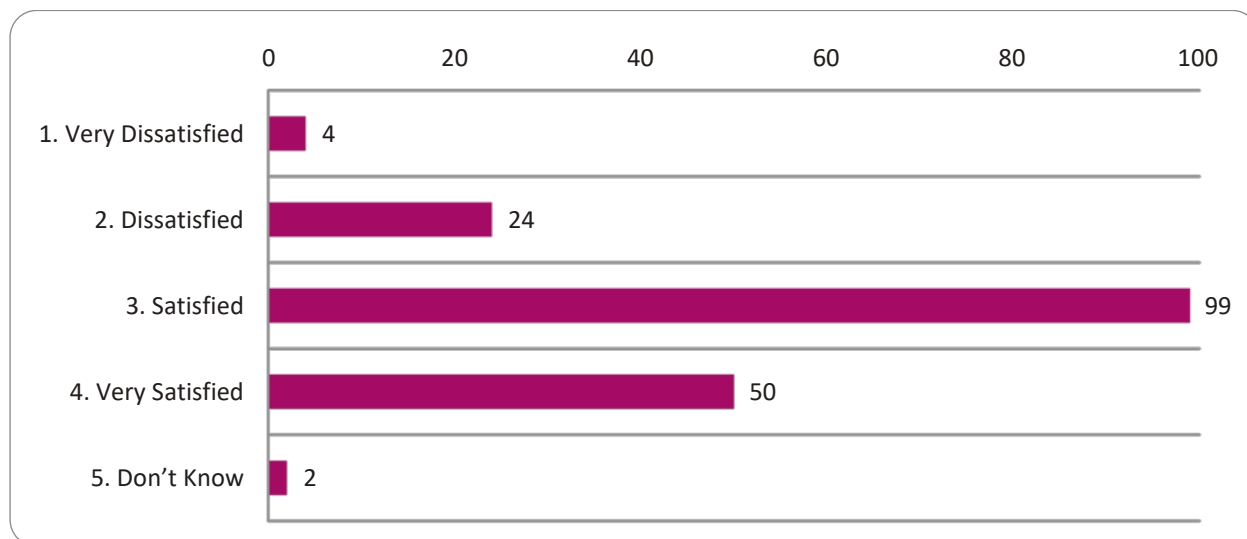


Figure 35 below show that Kincardine's residents would rate its quality of life as predominately 'Good' or 'Very Good.' Between those two responses, 93% would rate Kincardine's quality of life positively.

**Figure 35 How would you rate the quality of life in Kincardine?**

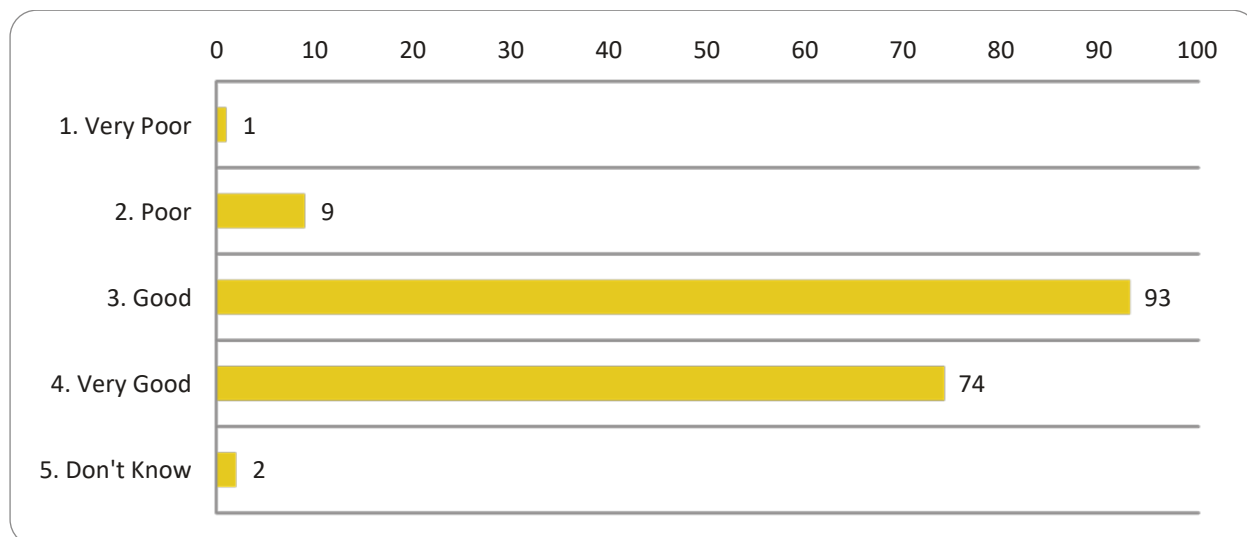


Figure 36 below shows respondents' agreement with common themes for Council to prioritize with this strategy. The themes were presented to respondents as follows:

- Corporate service delivery – the provision of modern and efficient service to the growing community, including infrastructure development and upgrades (incl. water, sewer)





- Customer Experience with municipal offices and employees. This would involve a renewed effort to improve all facets of customer service.
- Customer Experience with municipal offices and employees. This would involve a renewed effort to improve all facets of customer service.
- Sustainability – fiscal, environmental, economic and social.
- Become an employer of choice, supporting the attraction and retention of talent and fostering a positive work environment
- Housing – addressing the need for a diverse housing mix to accommodate employment growth & workforce attraction

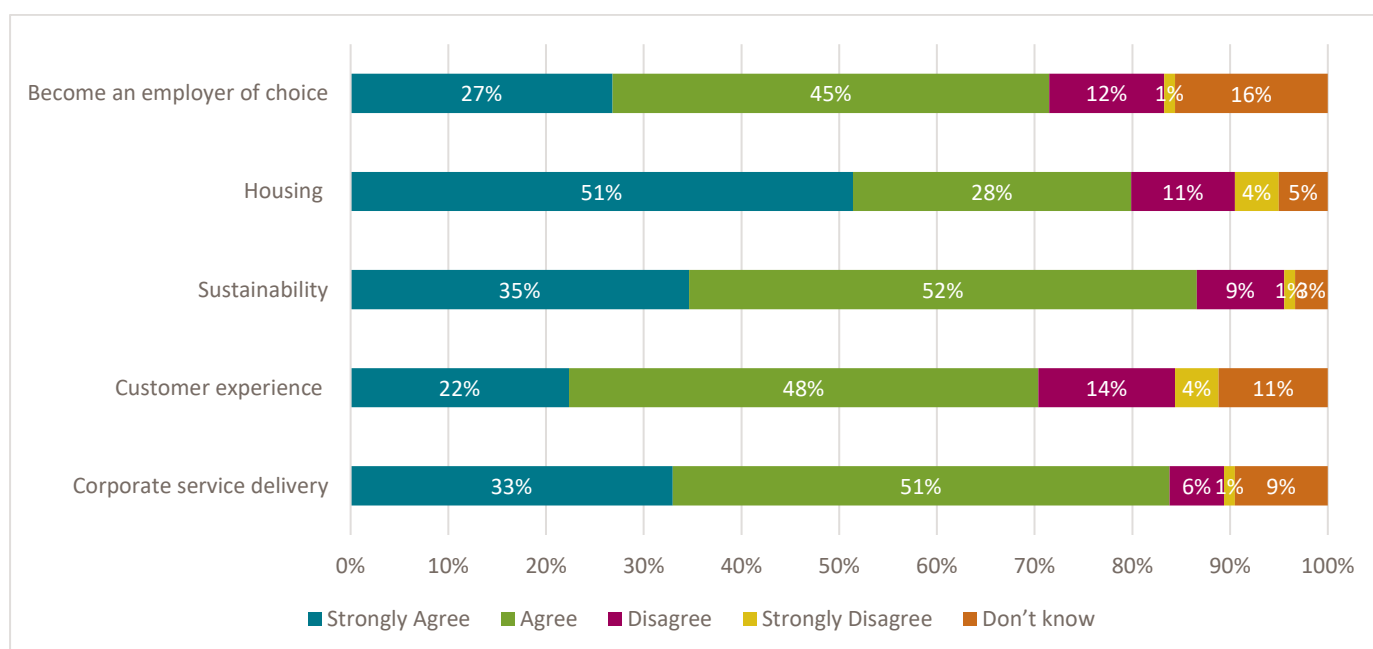
Addressing the need for a diverse housing mix to accommodate for employment growth and workforce attraction was resoundingly a priority for respondents, with 51% indicating that they strongly agreed with this priority, and 28% indicating that they agreed.

Sustainability was a theme that also resonated with respondents. 87% of respondents either strongly agreed or agreed that the sustainability of fiscal, environmental, economic, and social matters should be a priority. This theme had the most combined ‘strongly agree’ or ‘agree’ responses.

‘Become an employer of choice’ had the strongest proportion of negative responses, as 16% strongly disagreed that that should be a priority theme moving forward. Customer experience was the response that had the least responses of agreement, and 11% strongly disagreed that it should be a Council priority.

Corporate service delivery was another important theme that respondents either strongly agreed or agreed with.

**Figure 36 Agreement with themes of focus for Council**





**Q#1: What are people saying about how things are going?**

Why are we so far behind Port Elgin
Why is there no way to shop downtown, it's all office space
Why is our grocery store so expensive
You can't find family essentials other than in the dollar store
So much of the housing is geared towards high-income Bruce Power workers
Why no recycling and composting?
Poor recycling programs
No youth programming
A lot of things going on in recreation
Arts, culture and heritage programming is lacking

**Q#2 If you could put your requirements to Council, what are your top 3?**

Affordable housing
Healthcare
More recreation facility for various – ice time, youth programs, no movie theatre, no youth hangouts
Shovel ready infrastructure for businesses to free up downtown space for retail
Incentives to bring business
Infrastructure – serviced lands/areas
Attainable housing
Youth centre/programs
Economic development – restaurants, shopping, entertainment
Waste management increased services – compost, recycling
Incentives to develop affordable housing
Affordable shopping/diversity
More options for recycling/compost
Rezoning downtown core to restrict office space and enable retail opportunities
Commercially zoned office/industrial park for office growth to retain businesses
More recycling options – compost, wet/dry, more items, receptacles.

**Q#3 What are the programs and services that we deliver best?**

Snow removal
Face to face customer service
A lot of free programs in recreation
Exceptional parks and outdoor facilities
We want to be more environmentally conscious
Need for bylaw enforcement for environmental enforcement



### Q#3 What are the programs and services that we deliver best?

Need more staff to do waste removal, recycling removal, enforcement, and communications to the community.

The community is critical of the level of service but also unwilling to pay more.

Residents have no understanding of how their tax money is spent.

### Q#4 How might we improve our service delivery?

We should speak to other lakeside communities for best practices

Make more services available online

Set up online payment options

Investigate shared service options with neighbouring municipalities (i.e., communications/by-law enforcement?)

Standardized response times across the organization

The squeaky wheel gets the grease.

We do have a high level of service compared to large urban, but people don't appreciate it.

We are not taking advantage of new technology for automation/phone systems etc. that could provide better customer service.

Feeling that everyone is stretched very thin...more resources, either people or technology, could help ease this.

Need for enterprise-wide software to help with coordination

Need to standardize programs and processes...i.e. response times, RFP's, CRM so that not redundant communication, etc. Will help to measure\*\*

#### 4.1.5 Staff Survey-Bang the Table

Following the conversation circle with staff on October 7, 2019, a survey was circulated to staff at the Municipality of Kincardine to accommodate for any staff who were unable to attend the in-person session. Municipal staff has a unique perspective on how things are going in the community. Many are front-line workers in the community, interacting with residents and doing on-the-groundwork. That grassroots perspective is essential to validate corporate strategic priorities.

What are people saying in the community:

- we are losing spaces downtown to offices
- less and less local businesses
- In general, the community is very responsive to even minor issues
- The most common complaints are regarding facilities, parks, beaches, etc. Places everyone uses. In general, the complainants are not taking into consideration
- how changes/improvements are not possible without significant increases to our taxes
- People say not enough local restaurants and shopping, and hard to access medical care



- People I talk to are excited by the current growth in town, new restaurants, more programming for children
- A consistent negative theme in conversation is the lack of anything to do for our local youth; teen programs are lacking in the community
- There is an overall wish for an increased level of services; people want more services: art classes, yoga, a youth centre, curbside composting and a new high school
- Services people are accustomed to in large Municipalities
- Overall, I think the feeling is positive. We live in a community that is engaged; our volunteers are our backbone and services are typically plentiful for most residing or visiting. On the flip side, we hear a lot about housing prices, low paying jobs, and a downtown that is quickly disappearing thanks to offices being set up.
- Our local economy and how this relates to tourism, population growth, etc. are all affected by these issues. Superb events and volunteerism won't sustain this community without something else changing concerning these other concerns.
- Not enough shopping, businesses, fast food options
- People talk about two things... 1. That there are too many "engineering firms" downtown, and it has pushed the restaurants and stores out. They would like to see more stores downtown. 2. The lack of shopping in Kincardine as opposed to our neighbours.
- They would like improvements to our recreation center mostly the pool and arena
- We are behind development in Port Elgin, fewer housing options, fewer amenities. - retail downtown is disappearing - builders want ready to build lots
- Lots of community involvement - wonderful community events
- People have a difficult time understanding why Kincardine does not have some of the same services as Port Elgin and Goderich. I have also heard people wanting to improve recycling in our community.
- Many customers have come in and told us how the community is very friendly
- Our waterfront, boardwalk area, is falling apart. Why can't the beaches be maintained better? Why can't things be looked after better? Why do trash cans disappear when tourists go. Why do all the public washrooms close in October even if the weather is still nice
- Why are things so slow to progress, services, why is building dept so hard to deal with
- Great but can be improved
- What I hear regularly is that we lack in residential building lots; the downtown has too many offices and that Port Elgin been way ahead of us.
- We are missing opportunities for retail.



#### 4.1.6 Community, Business and Committee Workshops

Three workshops were held on October 10 and 11, 2019, at the municipal office. A total of 33 business and community members attended the open sessions and seven representatives from Committees of Council attended a special individual session. While these sessions with external stakeholders were primarily designed to inform the Economic Development Strategy, the feedback that was obtained also provided some insight into the Corporate Strategic Plan. Handouts were also provided for those wishing to contribute anonymously. The summary tables below highlight the responses received.

##### Business Session # 1

Q#1 What do you cherish most about Kincardine?
The Lake
We take the lake for granted
The extensive trail system
Strong volunteerism
Safe community
Saturday Night march/parade
Lots of diversity for a small town
We have our pride parade
Great multicultural day.
Heritage...Walk of Houses. We have a lot of this.
Arts community
It's a tourist community but doesn't feel that way.
Monday market in the summer
Queen Street is a great meeting place, but we have started to think about it as a place to shop.
Strong relationships between businesses and customers but now there are fly by nighters who are coming in...don't want to lose that relationship.

Q#2 Given the investment, what economic opportunities does this present?
Nuclear sector bringing in intelligent employees...how can we use these companies and talent in other spheres
People who are coming in want higher quality entertainment
Values of those coming (environmental, education, recreation) will influence the community
There are a lot of spin-offs that will be created (i.e., new childcare centre being opened)
Lots of opportunities for local training
Need more ambient coffee shops
Agriculture and cannabis
Partnerships of skills, training, and industry. Let's train our kids so they can stay here.
Fanshawe can't bricks and mortar, but we can partner with people who have space in the community



## Q#2 Given the investment, what economic opportunities does this present?

Can we leverage empty Bruce Power buses

Lots of opportunities for skilled trades

## Q#3 What are the challenges

Bruce Power is the gold standard for jobs...it's seen as the only option.

Communications opportunities to share other career opportunities

We are going to need more options for the aged population

We need more housing options for those on the lower end of the scale

Balancing the need for growth with respect for farmland, indigenous communities

We need to attract doctors.

Paramedic services need to keep up.

We are behind on infrastructure. We are behind, but we can't just catch up, we need to get ahead.

This Council needs to think big, think bold right now.

Lack of commercial spaces.

Infrastructure is stretched to the max.

Buy local campaign...so many people leave to go elsewhere to shop, and there is a mindset that needs to shift

Give people the facts about the impact of shopping local.

How can we keep the workforce living here?

## Q#4 What are the steps that must be taken by the municipality to manage anticipated economic growth?

Council needs to take risks and take on debts.

There are a lot of houses on the books...how can Council keep these moving?

Saugeen Shores got the leg up on us because they had land already developed.

The municipality needs to continue to develop serviced lands.

Four approved subdivisions

We can't hang our hat on tourism...season is only a couple months long

Change of Council has been positive

We have a lot to be thankful for

## Business Session # 2

### Q # 1 What do we Cherish

Outdoors, environment, trail system

Vibrant community

Quality of life, quality of people.





#### Q # 1 What do we Cherish

We punch above our weight in terms of offerings for a population our size
Historic downtown with a history in each building.
Diversity for a town of its size
The proximity of downtown to the beach. Can see the sunset from the downtown

#### Q # 2 Economic Opportunities

No mention of hydrogen in all of our discussions...why has this not been leveraged?
More housing development
Labour shortage in the service sector with no place to live
Creating apartments in existing houses
More development on the beach, more commercial opportunities.
We need serviced land

#### Q # 3 What are the Challenges

Lack of commercial spaces
Highway 21 is often closed in the winter, low-speed limit...it's not easy to get here.
Aging hospital and high school
Lack of medical services, lack of CT scanner
Labour shortage is going to get worse than better
Small businesses are having trouble paying competitive wages when customers are not shopping locally
TFW program is really hard
Concierge serves to assist businesses
Communication needed to convince people of the value of shopping local
We need to ensure that it's not just high end in Kincardine
Housing is a major issue...how to make it more affordable
What steps the municipality take to manage anticipated economic growth best?
Most of our residents don't know about these underlying issues...Town needs to educate.
The municipality needs to do a better job of letting people know what is going on
The official plan is way out of wack in terms of housing need projections

#### Q # 4 What can the municipality do

Downtown needs not to be a commercial office space.
Businesses are not going to build the buildings; they need something that is a turnkey
The municipality must support downtown businesses, support homepreneurs. Perhaps encourage intensification as a stated goal.





#### Q # 4 What can the municipality do

Parking is a huge need

### Committee Session

#### Q#1 2034 What does success look like?

We have a growing population

We have education and healthcare options

More diversity of housing options, for multiple levels of income, variety of family statuses, seniors

More even age distribution

7 Acres has helped bring younger people

People are starting to go for education and come back as opposed to just going for education and not returning

Why is Port Elgin growing faster than us?

Vibrant arts, culture and heritage community

Quality facilities - New community centre, two ice pads, a new pool,

New high school

Business Park outside of downtown so that restaurants and shops can bring vitality downtown

Post Secondary options offered locally

More diversity in the business environment...not just nuclear or service jobs

A diverse variety of jobs, a balanced economy

Sustainable community, with support for local

We have maintained our heritage features/buildings

#### Q#2 Economic Opportunities

A lot of businesses that have located are not just nuclear...we have an opportunity to link them with other sectors.

Who else can you bring to town?

Charitable sector and community support through corporate sponsorship

Opportunities for partnerships

Tourism and supportive businesses – food, child and elder care, personal services

Lots of commercial gaps that can be filled

#### Q#3 Challenges

We need infrastructure in place

Housing

The danger of overgrowth as the investment is not indefinite

Need to focus on healthcare



### Q#3 Challenges

Changes in Council can have an impact on the plan...it needs to have stability but also flexible

### Q#4 Priorities for the next 4-5 years

Making life more affordable for low wage owners...if not taken, things will continue to get wider.

Provide incentives for affordable houses, housing, transportation

The right mix of serviced lands (industrial/commercial/residential)

Open for business – simplify the process, reduce the red tape, streamlined process...also running events

Variety of land uses planning

Ready, developed land

High speed – broadband

Innovative technologies

Service gaps (arts and culture, social and recreation)

Communications (internal and external)

Staffing

Advocacy for school and hospital

Affordable – a living wage, housing

Open for business

### Q # 5 Committees role

lots of ideas, feedback, spread the word

Recognition needs to happen

Need help to make things happen – feel like the municipality is working against us trying to put on community events.

Risk-averse municipality

Can't buy kids clothes in town

9 and 21 lands need to be opened up



## 4.2 Emerging Issues from the Consultation Process:

### **Need for Clear Vision and a Unified Voice**

- A unified vision and purpose can help align the Municipality's efforts
- Need to identify what quality of life factors matter most
- Each player has a role to play, must understand this role and responsibilities.

### **Financial Sustainability**

- The Municipality is facing greater demands than ever for services and amenities
- The rapid growth of jobs and investment will challenge our infrastructure
- Kincardine is missing out on opportunities to other municipalities that were ahead of the curve
- High household incomes can mask the needs of those on the lower end of the income spectrum

### **Deliver a High Level of Service**

- Residents and businesses expect a higher level of service than ever before
- How do we leverage technology as a Municipality to better serve the community?
- Can changes to the organizational structure better position the Municipality to serve?
- Do we have the resources required to respond to increased demands and development spurred by Bruce Power and other major projects?
- Can we offer new programs to meet the needs of young people?

### **Adaptive to Changing Demands**

- Organizational Review will help better align responsibilities
- An influx of workers and their families will require different services and amenities Emerging from a difficult period
- Nuclear sector investments provide an opportunity but must also be thinking beyond that
- Need to accommodate nuclear suppliers outside of downtown

### **Communications**

- Lack of internal and external communications
- Lack of internal knowledge of departments = inability to effectively direct residents
- Without a central reception, there is no triage or tracking, no standardized processes

### **Modernization**

- Staff don't have the technology or programs to do their job effectively
- Residents expectations for service are outpacing what is being offered
- Diversity...do we reflect the community we serve
- Streamlined, standard operating procedures



### **Environmental Concerns**

- Insufficient staff to do collection and enforcement
- Desire to do more (recycling streams, compost)



## 5. Performance Measurement Framework

This performance measurement framework has been provided for the purpose of evaluating the successful implementation of the Corporate Strategic Plan. The framework contains the overarching goal followed by a number of priorities that have been identified by council and staff that contribute to the overall success of the Corporate Strategic Plan. The measures are identified and are included as recommendations for administration and council to utilize with the understanding that each priority and action must be looked at through the lens of the municipality's ability to implement, capacity to measure and any needed resources required to ultimately deliver the expected result. While some actions are ongoing and others are timebound, it is essential that reporting on the chosen measures is undertaken on a minimum annual basis. Additionally, these recommended measures must themselves be closely evaluated and adapted on an ongoing basis as progress is made, new measures emerge or as resources allow. Since the Corporate Strategic Plan goals extend across departments, the recommended measures take a whole of organization approach with each department responsible for identifying and reporting on the relevant measures to their service area.

The overall performance measurement framework is followed by a sample departmental template using the Balanced Scorecard approach. The Balanced Scorecard was developed by Robert Kaplan and David Norton and its' purpose is to identify four main perspectives with which to assess and evaluate strategic priorities including: Financial, Internal Business Process, Learning and Growth and Customer.<sup>55</sup> Many municipalities have taken the Balanced Scorecard approach and adapted it to meet their own unique needs. The financial perspective and associated measures refer to how financial decisions are viewed by shareholders (taxpayers). In the municipal perspective, this relates to the financial sustainability and value that is being achieved through the strategic priority. Internal Business Processes refers to measures that look at what actions are implemented internally and focus on those activities that have the greatest impact. This perspective focuses on whether the actions are improving the overall operation of the Municipality. Learning and Growth focus measures on how activities contribute to continuous improvement and value creation within the organization and its employees and the Customer perspective focuses on measures that evaluate and track customer (resident) experience and their satisfaction.

The aim of the template is to provide department and unit managers with a practical tool that they can utilize and adapt to their own annual business planning with the overall Corporate Strategic Plan and expectations of performance measurement and management.

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<sup>55</sup> [Harvard Business Review, Focusing your Organization on Strategy with the Balanced Scorecard 2<sup>nd</sup> Edition](#)



## Sample Report Card Template

Guiding Principles				
<i>Sustainability, Customer Service, Informed Decision-Making, Communication &amp; Transparency, Reflect the Entire Municipality, Inclusive</i>				
Goal 1: Human Resources Alignment				
The Municipality has a skilled and aligned workforce, positioned to support municipal operations and advance economic development and growth				
Strategy	Existing or Proposed Action	Evaluated Perspective	Measure	Current Status
Develop a strategy to attract/retain talent to the Municipality in a competitive workforce environment.	Talent attraction and retention strategy including policies for recruitment, retention and competitive compensation and benefits	Financial, Learning and Growth	Quality of applications for advertised positions, Rate of employee turnover	
Goal 3: Sustainable Practices				
The Municipality is progressive in its efforts to maintain and build out infrastructure, its operational practices and managing finances				
Strategy	Existing or Proposed Action	Evaluated Perspective	Measure	Current Status
Investigate energy efficiency upgrades across municipal fleet, buildings and infrastructure to reduce environmental impact and uncover cost savings over the long term.	Municipal energy audit/assessment	Financial, Internal Business Processes	Reduction in energy costs, Reduction in energy usage	