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Incorporated in 1906, the District of Summerland is an 11,200 person suburban municipality in the Okanagan Valley situated between Kelowna and Penticton. A member municipality of the Regional District of Okanagan Similkameen, Summerland has an area of 73.8 square kilometers with vineyards, orchards, mountains and sandy beaches offering breathtaking views.

The new Summerland Council supports the ‘four pillars’ model of community sustainability, which emphasizes the need to promote the social, economic, environmental, and cultural well-being of the community. A ‘balanced scorecard’ approach to strategic planning was used to establish vision, mission, values, community themes and goal, corporate objectives, targets, and key performance indicators. To move the community forward, Council decided to prepare a one-year strategic plan and opt for a more corporate approach in 2015.

To inform the 2015-2019 plan, the District mainly relied on the following: previous community surveys, an environmental scan of the 2014 municipal election, Council/Staff brainstorming sessions, 2015 Financial Plan, previous strategic plans, and the Official Community Plan.

For the 2016/2020 strategic plan, the District will have the time for more extensive community outreach such as a community survey, stakeholder meetings, and web based public input. As conditions change, Council has complete flexibility to adjust the strategic plan.

The Balanced Scorecard Approach ensures the Municipality considers citizen, financial, internal process, and learning and growth perspectives to set a realistic course, align the organization, engage the community, and be accountable. The strategic plan is a work in progress and over time will closely integrate with the Official Community Plan and Financial Plan. Each year, Council will report on its strategic, financial and operational progress through an annual progress report.
The District of Summerland Vision points which way to go, but not how to get there.

The Official Community Plan (OCP) provides direction.

The Strategic Plan gives the priority, allowing energy to focus on what is most important.

The Budget provides the funding for planned activities and ongoing operations.

The Annual Progress Report provides a synopsis of the previous year’s strategic, financial and operational progress.
### Summerland's Balanced Scorecard

The Balanced Scorecard is a strategic planning and management system that clarifies vision and strategy and translates them into action. It offers feedback around internal business processes and external outcomes to continuously improve performance and results. The Balanced Scorecard shown below summarizes the citizen's vision of a quality of life based on environmental integrity, social wellbeing, cultural vitality and economic vibrancy, balanced with the Corporation's need to consider financial, internal process, and learning and growth perspectives to attain the vision.

#### Community Themes

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#### Citizen Objectives

- **C1** - Protect water supply
- **C2** - Protect and enhance air, water and land quality
- **C3** - Plan growth and preserve ALR
- **C4** - Link neighbourhoods
- **C5** - Enhance public safety
- **C6** - Strengthen the physical, cultural and democratic participation of citizens
- **C7** - Facilitate economic development
- **C8** - Foster Corporate excellence

#### Financial Objectives

- **F1** - Sustain community infrastructure
- **F2** - Maintain comparable taxes and fees
- **F3** - Build new partnerships for funding and services
- **F4** - Diversify revenue sources

#### Internal Process Objectives

- **P1** - Implement sustainability principles
- **P2** - Engage the community
- **P3** - Provide best value for money
- **P4** - Monitor and report progress

#### Learning and Growth Objectives

- **L1** - Develop and retain a skilled municipal workforce
- **L2** - Leverage technology, innovation and best practices
The Summerland Official Community Plan (OCP) policies express the fundamental values and goals of the community and set directions for achieving a collective vision.

“Our historic lakeside community has a collective sense of belonging and preserves and enhances its quality of life, agricultural character and its distinctive natural setting in a manner that reflects our strong social values.

We respect our traditional small town character and proactively work to ensure balance among our shared values of protecting our natural environment, supporting a sustained local economy, showcasing cultural and historical legacies and providing quality facilities and services for our diverse population both now and for future generations.”

The Summerland Vision tells us where we want to go but not how to get there. The OCP guides our direction while the Strategic Plan provides the priority, allowing us to focus our energy on what is important. By having a Strategic Plan, we have cleared a path to get us from where we are today to where we want to be tomorrow.

**Corporate Mission**

The following Mission is a statement of the Corporation’s core purpose:

*To foster a progressive, healthy, and innovative community by continually improving our social, environmental, cultural, and economic well-being for present and future generations.*

**Corporate Values**

The following corporate values express the core convictions Council and employees share about how they must conduct themselves to fulfill the Corporate Mission:

**Honesty** - We are trustworthy and tell the truth; we are accountable and follow through on commitments; and, as professionals, we accept no gift nor favour nor misuse of public time or property.

**Respect** - We treat everyone equally and justly, and we hold each other and those we serve in high regard and have a modest sense of our own importance.

**Creativity** - We are imaginative, original, innovative, progressive and resourceful in accomplishing our tasks.

**Transparency** - We communicate clearly and accurately and offer easy public access to information, and our collaborative, thoughtful and nonjudgmental decision-making involves all types of people.
**CITIZEN OBJECTIVES** – *Is the municipality delivering services that citizens want?*

**C1 - Protect water supply**
Ensure the District has ample water volume for agricultural, domestic, commercial, industrial uses and wildlife habitat.

**C2 - Protect and enhance air, water and land quality**
Restore and protect air, land and water quality to support a healthy local ecosystem for plants, animals and people.

**C3 - Plan growth and preserve Agricultural Land Reserve (ALR)**
Balance growth with environmental sustainability and community values and cooperate with the Agricultural Land Commission (ALC) to preserve Agricultural Land Reserve.

**C4 - Link neighbourhoods**
Make physical, social, and cultural connections among neighbourhoods to continue building a sense of community.

**C5 - Enhance public safety**
Maintain a comprehensive emergency response strategy and engage the community in problem solving.

**C6 - Strengthen the physical, cultural and democratic participation of citizens**
Build a dynamic community by providing opportunities for residents to be physically, culturally, and democratically active.

**C7 - Facilitate economic development**
Facilitate stakeholders and the community in growing a local and regional economy.

**C8 - Foster corporate excellence**
Achieve excellent corporate results through outstanding practices in leadership, communications, motivation and innovation.
FINANCIAL OBJECTIVES – Is the municipality managing resources wisely?

F1 - Sustain community infrastructure
Provide efficient, affordable, accessible and reliable public services, programs and utilities that sustain mobility, public safety, the economy, and community liveability.

F2 - Maintain comparable taxes and fees
Deliver a regionally comparable package of services, taxes and fees.

F3 - Build new partnerships for funding and services
Seek out cost-sharing or service delivery partnerships to reduce costs or improve services.

F4 - Diversify revenue sources
Increase and diversify the revenue base for infrastructure replacement including user fees, land disposal and renewable energy generation, and support the business sector to grow the commercial tax base.

INTERNAL PROCESS OBJECTIVES – How does the organization improve business processes?

P1 - Implement sustainability principles
Continue to incorporate sustainability principles in municipal land use and operational and reporting systems.

P2 - Engage the community
Develop and strengthen partnerships with residents, neighbourhoods, community organizations, social services, schools, businesses and governments.

P3 - Provide best value for money
Continually review operational processes, searching out redundancies, changing conditions or improved technologies to reduce cycle time and improve service to deliver best value for money.

P4 - Monitor and report progress
Continue to improve service delivery through use of customer consultation to anticipate and exceed their expectations.

LEARNING AND GROWTH OBJECTIVES – How does the organization give our employees the tools and training to continually improve and respond to changing needs?

L1 - Develop and retain a skilled municipal workforce
Recruit and retain a workforce that is committed to and accountable for quality and value in service delivery.

L2 - Leverage technology, innovation and best practices
Improve organizational effectiveness and efficiency with a focus on technology, innovations and best practices.
Environmental Integrity – A Vision

Summerland is a model steward working to improve and balance the natural and built environments. It restores and protects air, land and water quality, the biodiversity of natural areas and eco-systems, and the network of natural areas, open spaces and urban forests. Climate change challenges are responded to actively.

Vibrant, distinct neighbourhoods provide a high quality of life for individuals and families. A variety of travel modes link neighbourhoods and businesses allowing for the safe and efficient movement of people, goods and services. Walking, cycling and transit are popular travel options resulting in less car dependence. Farmland is protected in the Agricultural Land Reserve.

Sustainable Environment

The challenge of any generation is to improve its natural and human environment before passing it on to the next generation. Summerland restores and protects air, land and water quality, and protects its water supply for food production, human consumption and habitat preservation. It significantly reduces emissions in municipal operations and adapts locally to climate change.

Initiatives to work toward a more sustainable environment:

C1 Protect Water Supply

a. Submit Grant Applications for water infrastructure - Garnet Valley / Jones Flat water separation - Water separation is required to reduce demand on the Water Treatment Plant during the summer months. The project includes the separation of domestic water from irrigation water in the West Jones Flat and Garnet Valley areas.

Owner – Works and Utilities
Target—Quarter 1 (Q1), 2017
Key Performance Indicators (KPI)—Completion of Construction
b. **Submit Grant Applications for water infrastructure - flume and water intake upgrade**

The flume and water intake on Trout Creek are aging and are rapidly deteriorating. The project includes replacing the concrete open structure flume with an enclosed pipe system and upgrading the intake structure to install remote monitoring and meet Department of Fisheries and Oceans (DFO) and Ministry of Environment (MOE) fish requirements.

Owner – Works and Utilities
Target—Q1, 2017
KPI—Completion of Construction

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**C2 Protect and Enhance Air, Water and Land Quality**

a. **Implement Climate Action initiatives** - Summerland is provincially mandated to actively promote and implement initiatives that will address climate change and reduce greenhouse gas emissions. The Climate Action Committee will reach out to the community for new initiatives, will review and assess the value of these initiatives against the value of existing initiatives, and make recommendations to Council.

Owner – Works and Utilities
Target – Q4, 2015
KPI – Implementation of initiatives

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b. **Submit Grant Applications for wastewater infrastructure infiltration bed and grit removal upgrade** - The infiltration bed and grit removal systems are old technology, rapidly deteriorating, and at risk of failure. The project includes replacing the infiltration bed and grit removal systems with new technology that will meet the District’s requirements for the foreseeable future.

Owner – Works and Utilities
Target—Q1, 2017
KPI—Completion of Construction
C3 Plan Growth and Preserve ALR

a. **Finalize an OCP amendment addressing urban growth** - The community did not support the 2013/2014 urban growth review options. The resulting Official Community amendment is currently at third reading and requires reconsideration so the community can move forward with a future urban growth blueprint.

Owner – Development Services
Target – Q2, 2015
KPI – An OCP amendment is adopted or defeated

F1 Sustain Community Infrastructure

a. **Develop Asset Management Plan** - The District requires a comprehensive asset management plan and a long term funding strategy. This plan will help the District develop the five year financial plan and a ten year capital plan while fulfilling new gas tax agreement obligations. Council have endorsed this project as a priority for a grant application under the capacity building stream of the Strategic Priorities Fund. This initiative may be phased over three years.

Owner - Finance
Target – Q2, 2015
KPI – Submission of the grant application

P1 Implement Sustainability Principles

a. **Develop debt, surplus and reserves policies** - The District needs to develop a framework for financial sustainability. Key elements of the financial planning process include policy statements for the levels of outstanding debt and debt servicing costs and the accumulated surplus and reserves on hand in each fund.

Owner – Finance
Target – Q4, 2015
KPI – Council adoption of policies related to the desired levels of debt, surplus and reserves
b. **Review and implement irrigator water meter rates** - The District has implemented a universal water metering program which includes domestic, commercial and irrigator water use. The revised metered rates and billing for domestic and commercial water use were implemented January 1, 2015. The District will undertake a review for irrigator water that includes a community consultation process in 2015 with a 2016 target of revised metered rates and billing.

Owner – Finance  
Target – Q1, 2016  
KPI – Council adoption of the amended fees and charges bylaw.
Summerland offers balanced, active and diverse lifestyles. Housing, public services and amenities are affordable, accessible and inclusive. Residents enjoy food security through safeguarding agricultural land. Land use planning, infrastructure design and service delivery address public safety issues.

Health and Wellness
Vibrant neighbourhoods in a sustainable environment supporting individuals and families are at the core of a healthy community and a high quality of life. Summerland residents should have affordable housing and access to local food. By managing resources wisely and partnering with community stakeholders, Summerland can sustain a healthy community through public health, schools, recreation facilities, transportation network, parks, trails and open spaces.
Initiatives to work towards health and wellness:

C4 Link Neighbourhoods

a. **Develop Community Trails** - The District will develop new trails to link neighbourhoods and offer residents and visitors of all ages, abilities and interest, health and wellness opportunities (e.g. Lakeside Trail Project and Council 2015 trail priorities).

   Owner: Recreation
   Target: Q4, 2015
   KPI: Council approved trails are development

b. **Develop opportunities for alternate transportation (non automobile) links between neighbourhoods and to the downtown core** - The District wishes to provide pedestrian and cycle/scooter transportation corridors throughout the community to make it more convenient to move through neighbourhoods without having to use a car.

   Owner – Development Services
   Target – Q1, 2016
   KPI – A proposed trail network map and strategy is presented to Council.

C6 Strengthen the Physical, Cultural and Democratic Participation of Citizens

a. **Develop a Parks and Recreation Master Plan** - The last Parks and Recreation Master Plan was developed in 2001 for a ten year period. Community input is imperative to the building of the master plan for future planning and budgeting for parks, trails and recreation infrastructure, programs and policies.

   Owner: Recreation
   Target: Q2, 2016
   KPI: Council adopt a Parks and Recreation Master Plan
F2 Maintain Comparable Taxes and Fees

a. **Build a rate comparison review into the financial planning process** – To remain competitive, the District requires information regarding the property taxes and user fees in communities of a similar size during the annual financial planning process (population/service area, region/province-wide).

Owner – Finance
Target – Q4, 2015
KPI – comparison of tax rates and user fees

P2 Engage the Community

a. **Launch the new municipal website** - The District will deliver a more rich, dynamic, responsive, and intuitive experience for website users. Providing a modern, user-centric web presence will provide Summerland residents, community groups, businesses, and visitors better access to timely and relevant information and enable better communication among all stakeholders.

Owner – Corporate Services
Target – Q1, 2015
KPI – New website launched

L2 Leverage Technology, Innovation, and Best Practices

a. **Implement recreation program registration website** – Recreation and Corporate Services will launch a website for Recreation users to register for programs. Current methods are limited and inconvenient in the context of the Internet-connected world, making on-line registration imperative to best serve our users.

Owner – Recreation Department
Target – Q4, 2015
KPI – Registration website launched
Safe Community
A community with increased citizen awareness, education and involvement creates shared responsibility and ownership of local safety issues. Shared ownership increases the community capacity to plan for and respond to safety concerns. Summerland builds community partnerships to reduce crime, increase building and transportation safety, enhance emergency preparedness, and improve prevention and response capacity.

Initiatives to work toward a safer community:

C5 Enhance Public Safety

a. **Build a Fire Department Training Facility** – Works and Utilities will complete site servicing and installing a Fire Department training building on the municipal property located at 9111 Bland St. This facility will provide for firefighter training in accordance with provincial standards, thereby enhancing firefighter and public safety.

Owner – Fire Department
Target – Q4, 2015
KPI – Begin use of the training facility
b. **Contribute to safer youth through restorative justice, high risk youth and School Liaison Programs** - To assist the Summerland Detachment in realizing the goal of Contributing to Safer Youth, three initiatives have been identified for 2015, including continued support for the Restorative Justice Program, High Risk youth programming and the School Liaison Program.

Owner: Area Commander RCMP  
Target – Q4 2015  
KPI – 2015 programs delivered

### L1 Develop and Retain a Skilled Municipal Workforce

a. **Ensure Firefighter Training meets or exceeds new Provincial Standards** - In November 2014, the Fire Commissioner released a new firefighter training standard, “The Playbook”. All fire departments operating within British Columbia must now use the material contained within the “Play Book” as a minimum training standard. The Province has now released phase one “Exterior Operations” training material with phase two “Interior Operations” training material pending.

Owner – Fire Department  
Target – Q4, 2015  
KPI – Completion of “Phase 1 – Exterior Operations”

### L2 Leverage Technology, Innovation and Best Practices

b. **Convert Fire Department operating software to new platform** – The Fire Department records management system utilized by the Fire Department requires an upgrade to a new operating platform. The vendor will no longer support the current version, and there are concerns that the existing data is at jeopardy of being lost if the conversion is not completed in a timely manner.

Owner – Fire Department  
Target – Q3, 2015  
KPI – Complete upgrade to new operating platform.
Cultural Vitality – A Vision

By enhancing both quality of life and place, a sustainable community promotes human wellbeing the focus of cultural vitality. Art, culture, and heritage bring beauty into our lives, nurture individual and community identity, promote social cohesion and create ‘social capital’. As a community rich in social capital, Summerland enjoys high rates of volunteerism and citizen involvement, an inclusive social and cultural fabric, and an intelligent, sensitive and wise ethic supporting ecological sustainability and wealth creation.

Creative Community

As a creative community, Summerland exploits the vital links between the arts, culture, heritage and commerce and consciously invests in human and financial resources to prepare its citizens to meet the challenges of the rapidly evolving post-industrial, knowledge-based economy and society.

Initiatives toward cultural vitality:

C6 Strengthen the Physical, Cultural and Democratic Participation of Citizens

b. **Develop a Cultural Plan** – Summerland needs a Cultural Plan to guide how the community develops, celebrates and funds Summerland’s culture into the future. A plan will help the District attract “the most important resource of a modern economy – creative people.”

Owner – Community Task Force (Development Services)
Target – Q3, 2016
KPI – Cultural Plan Adopted
Active Citizenship

Summerland fosters a participatory governance environment where citizens can connect and engage, and can contribute information, ideas and opinions to decision-making processes that will help lead the community to its full potential.

Initiatives toward active citizenship:

P2 Leverage Technology, Innovation and Best Practices

b. **Amend the Procedure Bylaw to get more public input** - The public desires more opportunities to offer feedback on Council meeting agenda items. A procedure bylaw amendment is required to provide public comment on agenda items before they are heard with a public question period at the end of a Council meeting on any item of local government interest.

Owner – Corporate Services  
Target – Q1, 2015  
KPI – Procedure Bylaw Amended

c. **Develop a Community Engagement Policy** - A community engagement policy identifies principles and best practices for reaching out to inform and involve citizens in public decision-making such as civic priority setting, program development, and service delivery. Community engagement improves governance and gives policymakers better information to make decisions, while meeting citizen expectations for transparency and responsiveness.

Owner – Administration  
Target – Q4, 2015  
KPI – Council Adopt a Community Engagement Policy
Economic Vibrancy – A Vision

The Summerland economy is connected locally, regionally and globally offering diverse economic opportunities. Summerland’s clean, appealing environment, skilled workforce, responsive public services and excellent community infrastructure make it an ideal place to live, work and conduct business.

Vibrant Connected Economy

The local economy is connected regionally and globally and therefore it must be resilient in uncertain economic times. Summerland supports community economic interests and active engagement in local and regional economic development strategies. Summerland preserves and promotes its key local economic competitive advantage: a high quality of life, place, people and environment.

Initiatives towards a vibrant, connected economy:

C7 Facilitate Economic Development

a. **Form a Mayor’s Task Force on Economic Development** - To strengthen economic development partnerships in Summerland, the District will, in concert with the Chamber of Commerce, arrange six roundtables to spur discussion, generate new ideas, build synergies, and encourage action to refresh the Summerland economy. To gain wider community involvement, the District will set up a parallel virtual roundtable to gather public feedback.

   Owner – Administration/Development Services
   Target – Q4, 2015
   KPI – Action taken on a minimum three ideas

b. **Consider Quick Read (QR) codes for engaging the community and visitors** – The District will consider installing signage at key locations throughout Summerland that include QR codes and clear instructions on their use and purpose. These site-specific QR codes could connect the current location of citizens and visitors to relevant web-based information, encouraging them to expand and enrich their Summerland experience.

   Owner – Corporate Services
   Target – Q3, 2015
   KPI – Signs with QR codes installed at key locations
c. **Review feasibility of a hotel tax** - The District will explore the impacts of a hotel tax to support tourism, particularly tourism promotion and the financing and operation of new tourism facilities that have District, Regional District, tourism industry’s support.

Owner – Finance  
Target – Q2, 2016  
KPI – Report to Council

d. **Refresh Wharton Street Area Redevelopment** - The District has a vacant parcel of land in the downtown core that it wishes to see developed. The District will review re-development options for the area to help revitalize the downtown commercial core.

Owner – Development Services  
Target – Q3, 2015  
KPI – Request for Proposal initiated

e. **Study potential uses for downtown back lanes** - The District wants to revitalize the downtown core with more efficient use of existing opportunities. Allowing additional business retail opportunities from back lanes is an interesting option.

Owner – Development Services  
Target – Q2, 2016  
KPI – Council review report identifying opportunities
f. **Support the Chamber of Commerce in implementing their strategy on investment attraction** - The District and Chamber of Commerce wants to attract investment. The District supports the Chamber business attraction initiatives such as Biking initiative regional map, Venture Connect program, InvestBC provincial publication, and a study on Precision Agriculture.

Owner – Development Services
Target – Q4, 2015
KPI – The Chamber’s 2015 initiatives are achieved
Service Excellence

Summerland employees provide efficient, accessible and reliable public services that meet community expectations. The Municipality attracts, develops, retains and trains a highly effective workforce and fosters a safe and respectful workplace. Summerland effectively aligns human, technological and financial resources to serve its customers.

Initiatives to work towards service excellence:

C8 Foster Corporate Excellence

a. **Hire a Chief Administrative Officer** - The Regional District of Okanagan-Similkameen will help the District recruit and select a new Chief Administrative Officer to advise Council, oversee municipal operations and engage the community, and execute strategic priorities.

Owner – Administration
Target – Q2, 2015
KPI – New CAO starts employment
b. **Dialogue to streamline the development approvals process** – The District will continually improve on service excellence as well as facilitate economic development. Examining development approval processes will identify service improvements.

Owner – Development Services
Target – Q4, 2015
KPI – Implement service improvements

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**F4 Diversify Revenue Sources**

a. **Confirm the land inventory and develop a land disposal policy** - A comprehensive land inventory will systematically earmark properties for public or private uses, and a land disposal procedure will ensure transparency, fairness and consistency. The District may want to dispose of lands surplus to its needs and target the proceeds to infrastructure and other land acquisition.

Owner – Administration
Target – Q1, 2015
KPI – Land Disposal Procedure completed

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**P4 Monitor and Report Progress**

a. **Conduct a citizen survey and prepare a five year strategic plan** - For the 2016/2020 Strategic Plan, the District will have more time for community outreach such as a citizen survey, stakeholder consultation, and web based feedback. With extensive public involvement, Council can enrich the current strategic plan.

Owner – Administration
Target – Q1, 2016
KPI – Council adopts strategic plan
P3 Provide Best Value for Money

a. **Review Funding Opportunities for Renewable Energy** - In 2013, the District received a study on self-generated electricity options based on technical, economic, environmental and social criteria. This initiative would reconsider these options in light of current funding resources for renewable energy.

   Owner – Administration  
   Target – Q4, 2015  
   KPI – Council report on renewable energy opportunities

b. **Review the impact of a potential sale of the electric utility** - The District wants to explore the impacts of selling the electric utility. In 2014, the District met with FortisBC to determine if there was any interest on their part to purchase the utility and learned that the verification of the assets of the utility is key to any further discussions.

   Owner – Finance  
   Target – Q3, 2016  
   KPI – Report to Council

For more information regarding the 2015 – 2019 Strategic Plan, please call Municipal Hall 250-494-6451.