



CITY OF SALMON ARM
CORPORATE
STRATEGIC PLAN
TOOLKIT



This is a toolkit designed to assist with the future implementation of the City of Salmon Arm *Corporate Strategic Plan* originally prepared in 2013. This provides a compilation of all the tools designed as part of the strategic planning process. These tools can be used to update the *Corporate Strategic Plan* as identified in the Implementation chapter (see Section 7) of the City of Salmon Arm *Corporate Strategic Plan*.

<i>Corporate Strategic Plan</i> – Vision, Values, Five Strategic Drivers and Core Services	4
Project Filter	5
Project Plan Template	6



Salmon Arm

CITY OF SALMON ARM: CORPORATE STRATEGIC PLAN

The City's Strategic Plan sets direction for decision making about significant projects anticipated to be undertaken within the next 10 years.

VISION

Salmon Arm is a community that has a comfortable, safe lifestyle and a vibrant feeling. The community deeply values the city's magnificent natural setting with its healthy ecosystems. The city is nestled between mountains and the shore of Shuswap Lake, offering beautiful scenery, greenery, rich agricultural land, and a desirable climate.

As the regional centre of the Shuswap, Salmon Arm has an abundance of recreational, educational, commercial, tourism, health care, and cultural

opportunities and services. The strong and growing economy supports varied employment and shopping, and innovative businesses and industry.

The community is spirited, diverse and inclusive, with housing for residents of all ages and needs. Everyone works together towards a shared vision of a good quality of life for all.

In the vibrant city centre, people live, work, visit, meet, shop and spend time enjoying diverse artistic and cultural activities. Downtown's unique

urban identity combines heritage preservation, a walkable environment, and high quality, mixed-use developments.

Green space extends throughout the city, including active recreation sites, and natural parks with trails. The city abounds with safe walking and cycling opportunities, connecting neighbourhoods, the city centre, natural areas and parks.

Source: City of Salmon Arm Official Community Plan 2011

VALUES

- Commitment to pragmatic leadership
- Excellence in service delivery
- Foster trusted relationships with our partners
- Respect what makes us unique
- Enable future generations to inherit a city that is vibrant, prosperous and sustainable
- Encourage citizen participation and input
- Ensure an efficient government
- Facilitate flexible and balanced planning processes

FIVE STRATEGIC DRIVERS WILL HELP US ACHIEVE OUR VISION & VALUES:



PEOPLE
We will make Salmon Arm a great place to live.



PLACES
We will position Salmon Arm as the regional centre of the Shuswap.



ASSETS
We will diligently reinvest in core services and infrastructure.



ENVIRONMENT/WATERFRONT
We will protect and enhance our waterfront and natural assets.



ECONOMY
We will bolster our economy through strategic partnerships.

THE MAJORITY OF THE CITY'S CURRENT CAPACITY IS DEDICATED TO PROVIDING THE FOLLOWING CORE SERVICES IN ADDITION TO DELIVERING SUPPLEMENTARY CORE SERVICES PROJECTS:

CORPORATE SERVICES

DEVELOPMENT SERVICES

ENGINEERING & PUBLIC WORKS

SALMON ARM RECREATION SOCIETY

EMERGENCY SERVICES



SHORT TERM

MEDIUM TERM

LONG TERM

CORE SERVICES

SUPPLEMENTARY CORE SERVICES PROJECTS

See Next Page



CITY OF SALMON ARM STRATEGIC PLAN: PROJECT FILTER

Last Revised Sept. 3, 2013

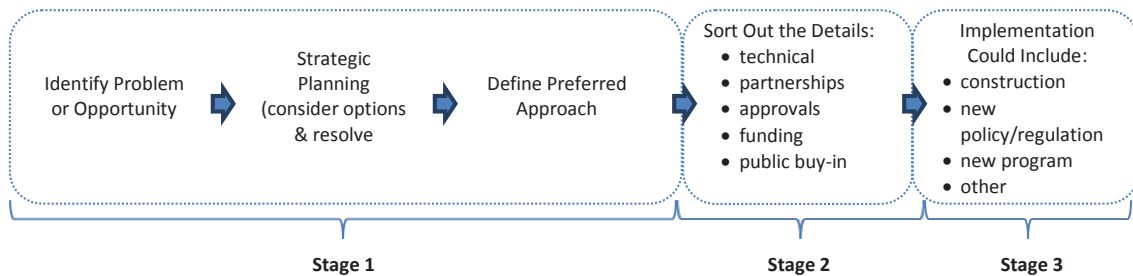
STRATEGIC CRITERIA: ASSIGN 1 POINT FOR EACH YES ANSWER		YES	NO	OTHER / COMMENT
	PEOPLE: To Make Salmon Arm a Great Place to Live			
	Does the proposed project or initiative...			
	Maintain a friendly, small town feel where residents can connect with one another?			
	Ensure that Salmon Arm is a safe and healthy community?			
	Create an inclusive community that serves the diverse needs of residents?			
	Enhance connectedness between people in the community?			
	Ensure a variety of housing choices for all?			
	Foster and enable public engagement and citizenship with residents?			
	Enhance our thriving arts and cultural community?			
	PLACES: Positioning Salmon Arm As The Regional Centre Of The Shuswap			
	Does the proposed project or initiative...			
	Ensure quality services such as education, shopping, health care, recreation, parks and housing are located in Salmon Arm and meet needs of residents/region?			
	Maintain a vibrant, compact, accessible and attractive downtown core?			
	Maintain and respect the concept of the urban containment boundary?			
	Protect and preserve agricultural lands?			
	Ensure safe and efficient transportation within and through the community?			
	Promote urban density and mixed-use development?			
	Enhance connections and accessibility to the waterfront?			
	ASSETS: Diligently Reinvesting In Core Services And Infrastructure			
	Does the proposed project or initiative...			
	Ensure on-going renewal and reinvestment in infrastructure?			
	Ensure connectedness and mobility through the community (roads, trails and sidewalk networks)?			
	Maintain or improve water, sewer and stormwater management infrastructure?			
	Ensure effective capital investment necessary to the health and economic well-being of the community?			
	Provide safe, treated drinking water?			
	Maintain or improve local traffic networks?			
	Promote active transportation (i.e. walking and cycling infrastructure)?			
	ENVIRONMENT/WATERFRONT: To Protect And Enhance Our Waterfront And Natural Assets			
	Does the proposed project or initiative...			
	Ensure lakeshore preservation and surface water quality?			
	Respect environmentally sensitive and riparian areas?			
	Protect natural ecosystems and wildlife habitat?			
	Address concerns and potential impacts of infrastructure located within the foreshore?			
	Promote sustainable and low impact development?			
	Enhance public education about the waterfront and natural assets?			
	Encourage linkages to natural assets via greenways and trails?			
	ECONOMY: To Bolster Our Economy Through Strategic Investments And Partnerships			
	Does the proposed project or initiative...			
	Support initiatives that create a vibrant downtown?			
	Facilitate the incubation of new businesses and industry to enable investment in Salmon Arm?			
	Ensure infrastructure is in place to support new industry (e.g. industrial park)?			
	Work with agencies responsible for the national transportation infrastructure (e.g. air, rail and highway) to support the safe and efficient movement of goods into and through the community?			
	Celebrate our economic diversity and engage with local businesses (i.e. industrial/manufacturing sector)?			
	Work collaboratively with our First Nations neighbours and the CSRD to enhance new development opportunities?			
	Foster relationships with key agencies to ensure high quality health and education services?			
Enhance relationships with neighbouring local, regional and federal agencies and governments?				
TOTAL POINTS FOR STRATEGIC CRITERIA →		<input type="text"/>		
OPERATIONAL CRITERIA: ASSIGN 1 POINT FOR EACH YES ANSWER & 5 POINTS FOR QUESTIONS IN RED		YES	NO	OTHER / COMMENT
Is this a core service as per strategic plan? = 5 pts				
Is this included in the City's five year financial plan? = 5 pts				
Does the City have the resources to effectively execute and maintain this initiative? = 5 pts				
Is this project urgent (e.g. compromises health and safety/legislation requirement)?				
Scale 1 to 5 (5 = urgent)				
Is this fully within the City's ability to influence/execute?				
Does this strengthen relationships/partnerships with other agencies and stakeholders?				
Does this have the potential to generate new and/or additional revenue?				
Does the community understand, need and support this project?				
Will this improve customer service?				
Will this foster positive community relations?				
Is there potential for grant funding (provincial/federal, other) now or in the near future?				
TOTAL POINTS FOR OPERATIONAL CRITERIA →		<input type="text"/>		
TOTAL POINTS FOR PROPOSED PROJECT →		<input type="text"/>		



PROJECT PLAN TEMPLATE

Project Name:					
Key Driver (s): Select all that apply	People <input type="checkbox"/>	Places <input type="checkbox"/>	Assets <input type="checkbox"/>	Environment/Waterfront <input type="checkbox"/>	Economy <input type="checkbox"/>
Responsible Department(s)					
City Staff Project Leader(s):					
Last Revision Date:					

Please indicate what stage this project is at: Stage 1 Stage 2 Stage 3



What is this tool?

The project plan template is used to define the context, scope and actions required to implement new projects. The template is divided into three sections: (1) project overview, (2) project scope, and (3) project work plan. Sections 1 and 3 are completed by the senior management team during the early stages of an initiative in order to generate common understand of the scope and identify key considerations. Once a decision has been made to move forward with a project, section 3 is completed by the responsible staff member to define the specific tasks, who will be involved and how the project will be communicated.

Why do we need this tool?

This Plan serves as the primary planning and communication tool stating what will be delivered according to the budget, time constraints, risks, resources, and standards agreed upon for the project.

Who participates in this planning?

This tool provides the opportunity for integrated collaboration between senior staff members representing relevant City departments. This enables more accurate scoping and a better understanding about resources required to deliver on the project.

CITY of SALMON ARM - PROJECT PLAN

Project Name:
City Staff Project Leader(s):
Revision Date:
Page 2 of 10

Table of Contents

1.0	PROJECT OVERVIEW	3
1.1	Project Definition	3
1.2	Scope	3
1.3	Context	3
1.4	Goals and objectives	3
1.5	Achieving Our Vision and Key Drivers	3
1.6	Relevant Policies (including OCP and/or other City plans/strategies).....	3
1.7	Opportunities	3
1.8	Constraints	3
1.9	Costs.....	4
1.10	Urgency	4
1.11	Current Project Status (internal)	4
2.0	PROJECT SCOPE	5
2.1	Defining the scope	5
2.2	Outcomes and Measures of Success	5
2.3	Partners	5
2.4	Community.....	5
2.5	Stakeholders	6
2.6	Issues Analysis.....	6
2.7	Risk Assessment.....	6
2.8	Project Motivation	6
2.9	Schedule based on Stage (identified on page one).....	6
2.10	Budget	6
2.11	Procurement	7
2.12	Scope change process.....	7
2.13	Approvals Required.....	7
3.0	PROJECT WORK PLAN.....	8
3.1	Work breakdown structure (WBS)	8
3.2	External communication.....	8
3.3	Internal communication	9
3.4	Crisis communication.....	9

APPENDICES

[Any relevant plans, maps, etc. related to this project will be attached as an appendix. List appendices here]

CITY of SALMON ARM - PROJECT PLAN

Project Name:

City Staff Project Leader(s):

Revision Date:

Page 3 of 10

1.0 PROJECT OVERVIEW

1.1 Project Definition

[Provide a brief description of this project including history and current influences. Note: the project may not be fully defined if the template is being used for the first time. If this is the case, this template will enable senior staff to begin scoping the project. As such, the project plan template will require updating as the project becomes better defined over time.]

1.2 Scope

[Is the scope of the project well defined? If yes, move onto 1.3. If no, what needs to be undertaken to better define and/or scope this project?]

Yes Move on to 1.3 below

No What needs to be undertaken to better define and/or scope this project?

1.3 Context

[What is the current context of this project? Why is this project identified as a priority? What previous plans/strategies/input need to be considered in this project?]

1.4 Goals and objectives

[What are the desired outcomes? What specifically will be achieved?]

1.5 Achieving Our Vision and Key Drivers

[Describe how does this project advance the City's vision and key drivers/priorities as identified in the Strategic Plan?]

- People –
- Places –
- Assets –
- Environment/Waterfront –
- Economy –

1.6 Relevant Policies (including OCP and/or other City plans/strategies)

1.7 Opportunities

[What opportunities does this project present to the City, the community, other?]

1.8 Constraints

[What are the constraints of this project? What barriers could get in the way of achieving a successful outcome? Areas of constraint could include: budget, resource availability, technology, political dynamics, schedule, policies, and external factors]

CITY of SALMON ARM - PROJECT PLAN

Project Name:

City Staff Project Leader(s):

Revision Date:

Page 4 of 10

1.9 Costs

[What are the costs of the project? What are the financial implications of this project? Have all aspects of the project been considered? Consider capital costs as well as on-going operations and maintenance.]

1.10 Urgency

[How urgent is this project and why? What are the risks of postponing this project?]

1.11 Current Project Status (internal)

CITY of SALMON ARM - PROJECT PLAN

Project Name:

City Staff Project Leader(s):

Revision Date:

Page 5 of 10

2.0 PROJECT SCOPE

2.1 Defining the scope

2.2 Outcomes and Measures of Success

[What are the desired outcomes of this project (both tangible and intangible)? How will success be measure by the team, the sponsor and the community?]

2.3 Partners

[If the City requires partnerships for this project, who would that be? Why]

- City only (no partnerships required)
- Residents
- Property Owners
- Users
- Council committee(s)
- Community organizations (list here) _____
- First Nations Adams Lake Indian Band and/or Neskonlith Indian Band
- CSRD
- RDNO
- Provincial government
- Federal government
- Funding agencies (list here) _____
- Special interest groups
- Other _____
- Other _____

2.4 Community

[Does the community know about the project? Does the community understand, need and support this project?]

CITY of SALMON ARM - PROJECT PLAN

Project Name:
City Staff Project Leader(s):
Revision Date:
Page 6 of 10

2.5 Stakeholders

[Who are the stakeholders? Who will be impacted? Consider residents, First Nations, community organizations, CSR, RDNO, provincial government, federal government, funding agencies, special interest groups, other?]

- Residents
- Property Owners
- Users
- Council committee(s)
- Community organizations (list here) _____
- First Nations Adams Lake Indian Band and/or Neskonlith Indian Band
- CSR
- RDNO
- Provincial government
- Federal government
- Funding agencies (list here) _____
- Special interest groups
- Other _____
- Other _____

2.6 Issues Analysis

[What issues may arise with this project?]

2.7 Risk Assessment

[Are there risks associated with this project? How likely is this to occur? What is the level of impact?]

2.8 Project Motivation

[What is driving this project? What is the motivation/requirement for this project?]

2.9 Schedule based on Stage (identified on page one)

[Create a schedule that outlines the key milestones and deliverables. Is immediate action required? If so, by whom?]

2.10 Budget

[Detail what this project will cost and how it will be funded including grants and other contributions from third parties (i.e. work in kind, donations, other.)]

Current costs estimates: (see section 1.9 – more detailed budget breakdown will be prepared when cost estimates are updated.)

- Property taxes
- Frontage taxes
- Fees/charges
- Long term debt
- Short term borrowing
- Development cost charges
- Reserves
- Work in kind City Community/Volunteer groups

CITY of SALMON ARM - PROJECT PLAN

Project Name:

City Staff Project Leader(s):

Revision Date:

Page 7 of 10

- Public/private partnerships
- Private funding
- Donations
- Provincial grant
- Federal grant
- Unknown at this time
- Other _____
- Other _____

2.11 Procurement

[What outside services and/or resources are required? How will these services and resources be obtained/engaged?]

2.12 Scope change process

[What scope change process will be followed? How will stakeholders be informed? How will the changes be documented and shared?]

2.13 Approvals Required

[What approvals would be required? Who are the key agencies that play a role in this project?]

- City only (no external approvals required)
- Residents
- Property Owners
- Users
- Council committee(s)
- Community organizations (list here) _____
- First Nations Adams Lake Indian Band and/or Neskonlith Indian Band
- CSRD
- RDNO
- Provincial government agencies (list here) _____
- Federal government agencies (list here) _____
- Special interest groups
- Other _____
- Other _____

CITY of SALMON ARM - PROJECT PLAN

Project Name:
 City Staff Project Leader(s):
 Revision Date:
 Page 8 of 10

3.0 PROJECT WORK PLAN *(to be completed when the work is ready to proceed)*

3.1 Work breakdown structure (WBS)

The work breakdown structure (WBS) serves as an overview of the tasks, schedule, and roles and responsibilities of the people required to deliver the project. **To create the WBS list all project activities down the left column and all of the persons (including staff, Council, committee(s), consultants and other people involved in the project) across the top row.** Then assign each person(s) the following responsibility rankings:

- **Responsible** – those who do the work to achieve the task. There can be multiple responsible resources.
- **Accountable (or Approver)** - this is the resource ultimately answerable for the correct and thorough completion of the task. There must be exactly one 'A' specified for each task.
- **Consulted** – Those whose opinions are sought. Two-way communication.
- **Informed** – Those who are kept up-to-date on progress. One-way communication.

Once the WBS has been completed, distribute a copy to each person so they know what they are responsible for and how they will be kept informed throughout the project. This helps to ensure that everyone is clear about their expected contributions.

EXAMPLE

TASKS	Start Date	Completion Date	Person(s) 1 (e.g. Project Lead)	Person(s) 2 (e.g. Staff member)	Person(s) 3 (e.g. Committee)	Person(s) 4 (e.g. Council)
1. Prepare project plan			A, R	R	R	C
2. Conduct start up meeting			A, R	R	C	I
3. Obtain relevant documents			C	A, R	I	I
4. Working session with Council			A	I	I	C
etc...						

3.2 External communication

[Who will be responsible and what steps will be taken to foster proactive external communication with those who are impacted by this project?]

-

CITY of SALMON ARM - PROJECT PLAN

Project Name:

City Staff Project Leader(s):

Revision Date:

Page 9 of 10

3.3 Internal communication

[Who will be responsible for communications and what steps will be taken to foster proactive internal communication with staff members, departments, committees, and Council on this project? Who will prepare the Communication Plan?]

-

3.4 Crisis communication

[In the event of a crisis who will be the official spokesperson for this project? Ensure they are aware of this responsibility and prepared to respond effectively based on the City's crisis communication policies.]

-

CITY of SALMON ARM - PROJECT PLAN

Project Name:

City Staff Project Leader(s):

Revision Date:

Page 10 of 10

APPENDICES

[Attach relevant plans, maps, or other documents related to this project/initiative]



WWW.SALMONARM.CA