



The Corporation of the Town of Milton

Report To: Council

From: Andy Scott, Director, Strategic Initiatives & Business Development

Date: July 17, 2023

Report No: ES-009-23

Subject: 2023-27 Town of Milton Strategic Plan

**Recommendation: THAT Council receive this report for information;
AND THAT Council endorse the 2023-2027 Town of Milton
Strategic Plan as presented within ES-009-023.**

EXECUTIVE SUMMARY

- Council have worked collaboratively to identify a series of practical and tangible priorities for this term of council.
- These priorities were informed by quantitative and qualitative data, and developed through a comprehensive strategic planning process.
- These priorities will drive progress towards the vision of Milton 2051.
- Almost all priorities and actions identified are already contemplated in the Town's fiscal planning.
- Priorities established are the focus of Council and staff for this term of council.

REPORT

Background

The intent of this report is to outline the 2023-2027 strategic priorities for this term of the Town of Milton Council. This strategic plan (Appendix A) is time-bound and sets out a series of deliverables which are deemed necessary to support our progress towards the long range vision of Milton in 2051.

A Strategic Plan creates a shared vision for Council and staff. The plan will serve as the building blocks for advancing the Milton 2051 vision through activities and initiatives aligned to each of the strategic themes.

Background

Developing the Strategy

The strategy is underpinned by a range of quantitative and qualitative research and analysis.

Research included:

- An update to the Town's community profile that incorporated the 2021 census data.
- A statistically valid community survey ([ES-004-23](#))
- Focus groups
- Prior research conducted to inform topic specific masterplans and strategies
- Service delivery focused indicators and the adoption of an annual reporting cycle
- External scan of provincial and federal policies, and white papers which might impact local municipal government
- An environmental scan of research and thought leadership conducted by a range of institutes that outline municipal historical trending and future considerations

Council members participated in facilitated readiness and strategy sessions, underpinned by this key information, throughout the strategic planning process.

Throughout this term of Council's orientation program, key community and corporate information was embedded to share relevant information. Additionally, Council participated in an information session to introduce the strategic planning process, followed by two readiness sessions. A joint Council and Senior Leadership Team strategic planning session was also conducted in late April 2023.

Discussion

Proposed Strategic Framework

The plan's framework updates our corporate vision and mission statement to align with Council's previously approved planning vision ([DS-005-21](#)). This planning vision is foundational to the Town's Official Plan update. Alignment between our corporate vision and our growth planning ensures municipal service delivery today and future growth planning link with the future vision of the community.

The strategy includes a four-year practical vision to help the municipality prioritize the types of work needed at this point of time, that will move us forward and contribute to the Milton 2051 vision. As part of the practical vision, five strategic themes emerged with each theme having a series of 'imperatives' or critical results that must be achieved for the desired level of progress.

Discussion

The strategic themes identified are:

- Invest in People
- Innovate in Technology & Process
- Quality Facilities & Amenities
- Connected Transit & Mobility
- Planned Community Growth

The data driven rationale for each is as follows:

Invest in People

- The Town's workforce is the single most important organizational asset. As the Town has grown over the last 20 years, the municipal workforce has grown in order to deliver the necessary programs and services across the community. From 2004 to 2022, the total number of FTE's employed by the Town increased from 257 to 652. However, when applying a rate per 1,000 residents, the number of FTE's available to provide programming and service delivery has actually reduced from 5.7 FTE's per 1,000 residents in 2004, to 4.6 FTE's per 1,000 residents in 2022.

The Town's workforce will need to grow as the community grows, and the demand for service increases. Future recruitment is critical to meeting service delivery needs, but it must be built upon a foundation of employee retention. The Town must ensure its workforce is highly skilled and motivated, able to service the needs of an increasingly diverse community, and be flexible to the changing geographic and community composition.

Over the last three years our full time voluntary turnover rate has increased from 2.50% in 2020 to 6.49% in 2022. While a voluntary turnover rate between 5% and 8% is considered healthy for an organization, the Town is experiencing ongoing recruitment and replacement challenges. Job vacancies are becoming harder to fill with a greater number of employees exploring employment options while employers offer new and emerging value propositions to attract talent. Vacancies create a burden on maintaining service delivery and customer service demands.

Innovate in Technology & Process

- There has been a macro level trend over the last 20 years to deliver services and information digitally. The local community has expressed a similar desire over a similar time period. In 2013, a community survey was conducted which found 33% of residents accessed municipal information primarily via the Town's website. In 2023, this has increased to 60%. How people interact with a municipality or access services has evolved to a digital-first focused approach.

Enhancements in technology and process improvements are critical to the Town's ability to scale service delivery in line with the anticipated growth in the local

Discussion

population while also maintaining excellent customer service. 77% of residents report satisfaction in both the overall quality of service, and the quality of online services provided by the Town.

Quality Facilities & Amenities

There is a need to maximize the use of the Town's existing facilities and amenities to ensure full use from a programming and service delivery perspective.

Residents across Milton demonstrate a high degree of satisfaction with the existing parks and sports fields (87% satisfied) and indoor facilities (79% satisfied). Maximizing the availability of these facilities and amenities will be of particular importance as Milton experiences an increase in the number of young adults (19 to 24) coming to our community to engage with our new post-secondary institutions. Additionally, this age group will access our municipal facilities and services, therefore plans will need to be developed to consider their needs and use patterns.

When asked about service levels relative to taxation, 22% of respondents suggested the Town should add new services and facilities (beyond anticipated growth levels) even if it means an increase in taxation and user fees. 44% suggested service levels should be maintained, with a further 34% suggesting service levels should be reduced to maintain the same levels of property tax and user fee rates.

Connected Transit & Mobility

Historically, the Town is below municipal comparators for public transit. . A metric used frequently across public transit system operators is the *hours of service offered per year, per capita*. Most comparable communities offer one hour of service per capita per year, the Town of Milton has typically offered around 0.3 hours per capita per year.

When asked via the community engagement survey, almost half of all respondents (48%) suggest the single biggest issue facing residents today is linked to transit and mobility.

42% of residents report satisfaction with the service offered today. These results suggest there is a strong desire from the community to make enhancements to our existing transit service a priority.

In addition, as Milton continues to grow and expand our transit-oriented neighbourhoods, the need to enhance our transit system must grow proportionately.

Lastly, post-secondary students are proven to be high public transit users, and with a Council identified priority to increase the presence of post-secondary partners in Milton, the service will need to adjust to meet these rider needs.

Discussion

Planned Community Growth

Community growth and development in Milton is expected to undergo a transitional phase within this term of Council with approved mixed-use, higher density uses across Milton. The Mobility Transit Study Areas (MTSAs) around the Milton Go Station (Uptown) and the Milton Education Village are areas expected to see significant construction activity within the next 5 to 10 years that will drive population and economic growth within the community. Early estimates suggest that Milton's population could be approximately 190,000 residents by 2027 with approximately 11,000 more dwellings (Source: Environics analytics - 2022 estimates).

55% of respondents to the community survey suggested they were dissatisfied with the way in which growth is being managed. Similarly, 40% of all respondents identified development and infrastructure as the single biggest issue facing the community.

Milton's approach to growth is deliberate and planned, with a focus on the right uses in the right places.

Appendix A outlines the strategic imperatives to support advancing each of the strategic themes. These strategic imperatives are the medium term focus to progress the community towards the long term vision of Milton. Staff will prioritize these strategic imperatives, dedicating time, resources, and effort in achieving these over this term of council.

Next Steps

Subject to Council's approval of this Strategic Plan, staff will begin implementation by incorporating the strategic themes into departmental business plans, budgets, work plans. Additionally, a reporting and performance methodology will be developed, outlining a set of key performance indicators. A communication plan has been developed to support a two-phase launch of the Strategic Plan, with a focus of launching the plan after endorsement of this report, with a broader internal launch once the plan has been incorporated into our annual business planning approach.

Financial Impact

The initiatives that are reflected within the proposed four-year practical vision have largely been considered in the Town's existing budget and forecast, along with the Town's fiscal impact study. Based on the prioritization process undertaken as part of the strategic planning process, the timing that was previously reflected may require adjustment. In some instances, additional or new costing information may also be required to ensure that Council's expectations are achieved.

Appendix B is attached, and provides capital and operating budget implications in relation to the strategic imperatives, where feasible, and based on the information that is available



at this time. In many instances, these estimates will be further refined as the projects proceed to more detailed phases of implementation.

The initiatives that are expected to require a notable capital investment during the four-year period include the transit maintenance facility, the civic precinct and a number of investments technology enhancements. These same items will also result in operating budget and property tax rate impacts, as will several of the other anticipated investments in services envisioned in the plan.

In the short term, the Town's most recent approved budget projected pressure on the Town's local property tax rate of 8.24% and 7.64% in 2024 and 2025, respectively. Since the time of those projections, further financial pressures has been identified in relation to inflationary pressure on services and infrastructure as well as legislative changes such as increases to the minimum wage. As such, in order to progress on priority items during this term of Council, further growth in the Town's property tax rates and/or the deferral or cancelation of other projected investments may be required.

In the longer term, the most recent fiscal impact study projected the gradual reduction in the Town's infrastructure funding deficit over a 20-year period, and continuation of the existing service levels during that timeframe. Expansion of services, including a new transit facility, civic precinct and investments in technology were all incorporated into that projection. The results showed an average annual property tax increase of 5.5% during the first ten years and 4.3% per year overall. These average amounts may be higher due to the recent spike in inflationary pressures, but overall are not expected to be materially affected by the priorities that have been confirmed through the strategic planning process.

Respectfully submitted,

Andy Scott
Director, Strategic Initiatives & Business Development

For questions, please contact: Andy Scott

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Attachments

Appendix A – Strategic Plan Vision, Themes and Imperatives Document

Appendix B – Estimated Financial Impacts

Approved by CAO
Andrew M. Siltala
Chief Administrative Officer



Recognition of Traditional Lands

The Town of Milton resides on the Treaty Lands and Territory of the Mississaugas of the Credit First Nation. We also recognize the traditional territory of the Huron-Wendat and Haudenosaunee people. The Town of Milton shares this land and the responsibility for the water, food and resources. We stand as allies with the First Nations as stewards of these lands.



Strategic Plan Vision, Themes, and Imperatives

Appendix A

Council Report: ES-009-29

July 17, 2023

Strategic Vision and Mission

Strategic Vision

In 2051, Milton will be a safe, diverse and welcoming community that respects its natural beauty and heritage, supports a range of neighbourhoods, sustains a strong and balanced economy, and offers outstanding opportunities to live, learn, work and play.

Mission

We provide excellent and sustainable municipal services to foster a vibrant and inclusive community where residents thrive, businesses flourish and nature is cherished.

Why a Practical Vision?

What needs to happen over the next four years to make Milton 2051 a reality?

- A Practical Vision is a specific description that aligns strategy with your long-term vision.
- This helps us prioritize the types of work that will move us forward.
- This creates a bridge to budgeting, informed by specific priorities defined by SMT.
- It is not a marketing slogan or communication product.
- Specific yet flexible.
- Our focus for discussion:
 - Is this the intent of what we collectively meant?
 - Does this answer your strategic questions?
 - What do you want to change?

Practical Vision: 2023-2027

By 2027, Milton will have laid the foundation for its future as a diverse and welcoming community defined by higher densities enabled by transit.

This foundation will include transit system advancements, prioritized infrastructure, quality facilities and a diverse housing stock in varied neighbourhoods where people can live and work close to nature.

The Town will maintain its appeal and character for residents and employers while adjusting services, operations and development to reflect evolving resident preferences, demographics and growth.

Practical Vision: Theories of Action

1. Investing in staff development **will** make the Town a magnet for diverse and talented people who deliver superior service and productivity during a period of rapid change. We have transitioned to a more permanent, balanced and highly skilled workforce commensurate with the requirements of our strategy.
2. Focused and substantial investments in technology, process improvements and meaningful partnerships **will** enhance customer service, embed sustainable practices and help us flatten long-term costs.
3. The arrival of postsecondary institutions Conestoga College and Wilfrid Laurier University **will** help Milton become a more complete community where students can learn, work and contribute to our economy.
4. Accelerated investments in Milton-owned transit assets **will** help us connect to other services, increase transit ridership and help pedestrians and cyclists better navigate a community defined by smart density, placemaking, mobility and economic development.
5. Fully funding parks, facilities and other municipal assets **will** allow us to maintain, operate and improve the quality and safety of sites residents value.
6. Building infrastructure **will** support the changing needs of our community as we prepare for higher density, mixed-use neighbourhoods that offer an excellent quality of life.

Strategic Assumptions

1. Strategy execution will not be materially impacted by legislative/structural changes, economic conditions, or other material disruptions (pandemic).
2. Staff and leadership will be stable.
3. Growth will continue close to forecast.
4. Residents will have sufficient buy-in.
5. Council will have discipline to focus on the strategy.
6. Financial investments will match strategy.
7. Federal and provincial governments will provide adequate support for plans.
8. Conestoga and WLU will build in MEV.
9. Technology costs will rise to 2027 and not increase to service levels.
9. Technology investments will require additional FTEs in the short term.
10. Increased investments in Human Resources and people development.
11. Civic Precinct will not be fully complete by 2027.
12. Investment in new facilities will depend on the use of existing facilities.
13. Some actions and investments in master plans will be slowed down.
14. Digital service delivery will be priority where possible.
15. Residential property tax rates will rise over the next 15 years to align with GTA average.

Strategic Themes

1. Invest in People
2. Innovate in Technology & Process
3. Quality Facilities & Amenities
4. Connected Transit & Mobility
5. Planned Community Growth

Invest in People

We will invest in a more permanent, balanced and highly skilled workforce required for Vision 2051, making the Town of Milton an employer of choice where diverse and talented staff are able to offer superior service and productivity in a period of rapid change.

Strategic Imperative

Create and execute a plan to attract and retain a workforce which:

- Meets the needs of our community today and tomorrow
- Supports the achievement of our practical vision
- Supports current/future service delivery and exceptional customer service

Innovate in Technology & Process

We will focus substantial investments in technology, process improvements and meaningful partnerships to improve customer service, embed sustainable practices and create a foundation for flattening long-term costs.

Strategic Imperative

Determine what opportunities exist today, which programs & services would benefit from digitization/modernization and what are the core priorities which advance our:

- Digital Strategy
- Customer Service Strategy
- Information Governance Strategy
- Technology enhancements identified in existing master plans

Quality Facilities & Amenities

We will deploy adequate and consistent resources to maintain, operate and intensify the use of parks, facilities and other Town-owned assets, improving resident safety and quality of place.

Strategic Imperative

- Create a roadmap for adequate and consistent investment that supports the operation and maintenance of Town infrastructure, facilities and assets
- Maximize the use of Town-operated facilities
- Use established service level targets to determine the threshold for future resource investments and infrastructure

Connected Transit and Mobility

We will accelerate investments in Milton-owned transit assets so these connect to other services, increase transit ridership and help pedestrians and cyclists navigate our community defined by smart density, placemaking, mobility and economic development.

Strategic Imperative

- Build a municipal transit facility
- Develop a plan to grow local transit service in line with anticipated population growth
- Strategically advocate for Metrolinx to improve inter-municipal transit connectivity in Milton
- Build upon Milton Transit's 'family of services' to increase ridership and support the post-secondary student population
- Expand the active transportation network to encourage alternative forms of transportation

Planned Community Growth

We will plan and build infrastructure that supports the changing needs of our community as we prepare for a future with higher density, mixed-use neighbourhoods that offer an excellent quality of life.

Strategic Imperatives

- Finalize the new Official Plan
- Develop a transitional neighbourhood parking strategy
- Partner with post-secondary institutions to support the new post-secondary population and transition graduates into the local economy
- Our focus:
 - Immediate: Uptown the Milton GO Station area; Civic Precinct
 - Medium term: Milton Education Village and Trafalgar
 - Long term: Britannia and Agerton

ES-009-23 - 2023-2027 Corporate Strategic Plan
Appendix B

Strategic Theme	Examples of Specific Projects	Estimated Capital Cost	Estimated Annual Operating Impact	Comments
Invest in People	People Strategy including Talent Strategy and Development, Leadership Development, Workforce Planning etc.	231,106		Further recommendations and requirements may result in future capital and operating impacts.
Innovate in Technology & Process	Human Resource Information System Project - Phase 2	1,604,159	59,000	
	Next-Generation 911 (NG911)	1,155,458		Operating Impacts will be further refined as project progresses.
	IT Strategic Plan	157,822		Recommendations from study may result in future capital and operating impacts.
	Building Public Portal Implementation	1,000,000		Operating Impacts will be further refined as project progresses.
	Financial System Update	3,500,000	55,000	
	Property Tax System Update	1,967,713	194,354	
Quality Facilities & Amenities	Maximize Utilization of Town Operated Facilities		10,897,000	Operating impact reflects the staffing requirement from the fire master plan (COMS-003-21), and will be refined through the budget process to reflect progress-to-date as well as the requirements of other program areas.
	Civic Precinct	36,458,744		Operating Impacts will be determined as project progresses.
Connected Transit & Mobility	Transit Master Plan	221,151		Recommendations from study may have future capital and operating impacts.
	Transportation Master Plan	282,064		Recommendations from study may result in future capital and operating impacts.
	Transit Maintenance Facility	49,558,811	1,169,657	
Planned Community Growth	Official Plan	814,961		Study costs shown, resulting growth will have further capital and operating impacts.
	Trafalgar & Agerton Secondary Plans	3,319,955		Study costs shown, resulting growth will have further capital and operating impacts.
	Britannia Secondary Plan	3,255,455		Study costs shown, resulting growth will have further capital and operating impacts.