



**STRATEGIC BUSINESS PLAN 2010-2013**

**Board of Directors Recommendation for approval: June 16, 2010**

**Ratified by the municipal members at the Spring General Meeting  
JUNE 23, 2010**

# **ACKNOWLEDGEMENTS**

Palliser Regional Municipal Services would like to acknowledge all participants in the process of developing the 2010-2013 Strategic Business Plan. These participants include Alberta Culture and Community Sprit, the Board of Directors, the elected representatives and administrative personnel from member municipalities, and the PRMS organizational staff.

As a regional service provider an active and participative planning process is vital to ensure we are effectively and efficiently meeting the service needs of our valued member municipalities.

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## PART I INTRODUCTION

### 1. PURPOSE – Why a Strategic Plan?

The most recent participative strategic planning process was completed in 2003-04. As a member municipality owned not-for-profit Company, it is important that PRMS continues to develop an open communication process by listening to the needs and wants of the members and to ensure that we meet those requirements in an effective and efficient manner.

The process described below has led PRMS to an understanding of the service provision expectations of our member municipalities. **The key message received through this process is to stick to what we know and develop the necessary capacity to be able to effectively provide the core or critical services before considering additional regional service opportunities.** It appears that PRMS has lost touch with our members needs over the past 4-5 years and **the focus of this strategic planning period will be to return to the core service provisions of PRMS and ensure we are meeting or exceeding the needs of all member municipalities in these areas in accordance with the Mission, Vision, Values and service areas as described throughout this plan.**

### 2. PROCESS – How did we get here?

The strategic planning process was developed by the PRMS administration and reviewed by the Board of Directors to ensure the members were comfortable to provide open and candid responses. A **questionnaire** was delivered to all member municipalities with an explanation of what we are trying to achieve through this process. The responses were compiled and provided to the strategic planning session facilitator, Terry Vaughan, Alberta Culture and Community Spirit, to ensure all information was available for consideration at the facilitated session. The member municipalities received an invitation to attend the **facilitated strategic planning session on May 19, 2010**. 21 participants took part in this activity. The summary of the questionnaire responses and facilitated session summary are attached as appendices to this document. The vital information provided by the municipal members with these resources has been compiled into this plan.

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## PART II BACKGROUND

### 1. HISTORY – Who we are and why we're here

Palliser regional Municipal Services was formed April 1, 1995 by Master Agreement and Bylaw of 22 municipalities as the successor to the Palliser Regional Planning Commission. In 1995 the Province of Alberta disbanded the 10 regional planning commissions across the Province and removed itself from municipal land use and regional planning functions. The municipalities were given the option of operating as an inter-municipal services agency. PRMS was formed to continue the work of the former PRPC through the commitment of the member municipalities.

Since that time PRMS has grown to include a total of 28 member municipalities in southeast central Alberta. The constitution of PRMS was formalized as a not-for-profit company status in 2008 with all member municipalities becoming formal shareholders of the Company. The Company Articles and Memorandum of Association replace the previous agreements and bylaws establishing the organization. PRMS is fully owned by the member/ shareholder municipalities.

The membership of PRMS has remained consistent with the 22 founding municipalities still functioning as active members and the addition of municipalities that are deemed to fit within the purpose and functions of the organization.

### 2. EXISTING SERVICES PROVIDED

PRMS provides a multitude of services to our member municipalities that include functions related to subdivision, municipal land use planning, mapping and database services. A comment from the facilitated strategic planning session was that **'It was nice to be reminded today about the volume and scope of the services that are delivered by PRMS'**.

PRMS services are currently provided on a request basis. A list of municipal requests is compiled and PRMS works through the projects on a first-come first-served basis. This process has been found to be subject to multiple problems including equity in the delivery of services and timely delays in project requests being completed. This has resulted from a number of factors described further in this plan. A more effective process is proposed later in this plan to alleviate the problems resulting from the current procedures to improve accountability and effectiveness of the delivery of PRMS services.

### 3. CURRENT RESOURCES TO PROVIDE THESE SERVICES

#### **Human Resources:**

Municipal Planning and mapping is a knowledge intensive business. Whether it is a Municipal Development Plan, Land Use Bylaw or a municipal infrastructure map it requires the necessary expertise and training to provide the services effectively. Any knowledge intensive business is primarily reliant on the right human resources to get the job done. Human resources currently make up approximately 70 – 75% of organizational expenses. These numbers are similar to other like organizations in the Province and depict the importance of skilled and innovative personnel to accomplish the service oriented goals of PRMS.

The current PRMS personnel include the following positions:

CEO/ Senior Planner  
Executive Assistant  
Planner  
Sustainability Coordinator  
Planning Assistant  
GIS Coordinator

One of the most inherent problems with the current practice of a first-come first-served approach to service delivery is that this process relies on estimating the service needs of our members. The message received from the strategic planning feedback revolves around the need for more timely and effective delivery of services, especially in consideration of long range statutory plans (MDP's, IDP's, ASP's, etc.) and Land Use Bylaw reviews. A strategy is proposed as part of the strategic plan to accomplish these service expectations.

**Capital Resources:**

The current capital resource inventory at PRMS includes the office building, vehicles, computers and software required to operate. As a regional services organization PRMS provides mapping services and database maintenance for the municipal members. This function requires the appropriate software and up-to-date survey data to be effective. The software required is often costly and providing the service on a regional basis provides economies of scale so that each individual municipality is not required to purchase the complete suite of software programs necessary to develop maps and manipulate spatial data (or provide the human resources for this aspect).

#### **4. CURRENT FUNDING MODEL**

PRMS operates with four main sources of revenue as follows:

- 1) Annual Municipal Requisitions
- 2) Subdivision fees
- 3) Safety Codes Services
- 4) Special Projects

**Annual Municipal Requisitions:**

The municipal requisitions are established along with annual budget considerations to cover the deficiency between all other revenue sources and organizational expenses for the given year to develop a balanced budget. A requisition formula that includes a combination of equalized assessment and per capita amounts was adopted at the inception of PRMS in 1995. The formula is still in use by other planning agencies within the Province as it recognizes that municipal planning functions are a result of the population base of a municipality and the equalized assessment. For example, a municipality with a larger population will require more service requirements than one with a smaller population base. The same tends to occur when a municipality has a higher equalized assessment.

**Subdivision Fees:**

Subdivision fees have been used as a method to recover a portion of the costs to provide subdivision services. Generally, the costs to provide this service are significantly greater than the revenues received from these fees. Majority of costs, as described above, are related to human resources and currently include a planner and planning assistant to provide the subdivision processing requirements with the senior planner providing guidance, assistance, file review and signing authority. The remainder of the costs of providing subdivision services is funded from a portion of the municipal requisition revenues.

**Safety Codes Services:**

Safety codes administration services are provided regionally by agreement with the Town of Drumheller and Superior Safety Codes for inspection services. Safety codes have provided significant revenue in years with higher levels of building and development. This revenue assists to subsidize the municipal requisitions as part of the revenue equation.

**Special Projects and contract work:**

Special projects are those that do not comprise a service that is regularly provided by PRMS and may take the form of special studies, policy development or mapping projects. These projects are generally funded through Provincial grant opportunities or other arrangements with the municipalities/ agencies requesting the project.

Special projects that are currently in process include the following:

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- Regional Profile and Communications Strategy creation and business plan update (Exploration Grant 1)
- Regional GIS and IT Service Strategy - user analysis, development of support program and action plan (PRISM II Exploration Grant)
- Oyen – Lyalta Rail Discontinuance Recovery Plan (RCAP Grant)
- Municipal Sustainability Plan Pilot Project (AUMA Contract)

The current special projects are expected to be completed in 2010. **Special projects tend to subsidize municipal requisition revenue needs however; over the past 4 – 5 years PRMS has become more reliant on grant funding to subsidize the core planning and mapping services. This has partially been done to reduce municipal requisition increases over the years and this trend is at a critical point.** A cyclical process has resulted where PRMS is more grant reliant to reduce municipal requisition increases meaning that more human resources (staff time) is spent on grant research and reporting requirements along with requirements of meeting the obligations of doing the work involved to receive the grant funds. This means that less time is available to fulfill the core service needs of the PRMS municipal members leading to a decrease in the level of service. This trend has been a major factor of why the first-come first-served business model for planning services has proven to be ineffective.

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## PART III MISSION, VISION, VALUES

### 1. MISSION STATEMENT – Overall Purpose of PRMS

During the facilitated session the municipal representatives and staff members identified the overall purpose of PRMS by responding to the following focus questions:

**What is the overall “purpose” of the PRMS?  
What makes the PRMS a “unique” association?**

The workshop participants initially identified characteristics of the mission for the PRMS, followed by the development of draft mission statements, which lead to creation of a proposed new mission for the PRMS. They also kept the existing PRMS Mission in mind as they provided their input on the proposed new statement. The results of this work are indicated as follows:

#### **PRMS Original Mission Statement (1995):**

“Our purpose is to effectively, efficiently and innovatively provide high quality, politically astute and environmentally sensitive professional planning and other services, in its capacity as a regional service agency and forum for the member municipalities in Southeast – Central Alberta”

#### **Current Mission (2004):**

“Our purpose is to foster a cooperative forum and provide services that support municipal members’ community planning and development in East Central Alberta”

#### **PRMS Mission Characteristics:**

- To provide expertise and services to communities who cannot access this support in-house
- PRMS provides affordable services and is not for profit
- Permitting and building development services
- Coordination of joint regional services
- All municipalities have an equal opportunity to access PRMS services
- Cooperative forum
- Effective
- Support for local governments
- Regional communication
- Responsive
- Consistency and dependability
- Accessibility

#### **Draft PRMS Mission Statements:**

“A sustainable regional organization providing effective responsive municipal services in an affordable effective manner”

“To be accessible to a cooperative region and provide services and expertise in an affordable and effective manner”

“To provide effective, quality and cooperative planning and development services to our member municipalities”

“Provide equal opportunities to member municipalities that makes it affordable for joint regional services”

“Our purpose is to coordinate a sustainable forum for regional services and communication that effectively and innovatively provides affordable services which are consistent and dependable”

“Our purpose is provide a cooperative forum and expertise services permitting and building development supports of local development”

“To provide effective local government services with expertise regionally that support regional cooperation and communication”

“To provide effective and affordable local government services with expertise that support regional cooperation and communication”

***The small groups came together and agreed upon the following as the final statement:***

## **PALLISER REGIONAL MUNICIPAL SERVICES**

### **MISSION**

***“To provide effective and affordable local government services with expertise that support regional cooperation and communication”***



## **PALLISER REGIONAL MUNICIPAL SERVICES**

### **VISION**

***“A vibrant regional organization that provides, relevant, effective and sustainable services and solutions to local governments”***

***Planning...Safety Codes...  
Regional Solutions...and more***

### 3. CORE VALUES AND GUIDING PRINCIPLES

During the workshop session the municipal representatives and PRMS staff determined the core Values and Guiding Principles that will guide the daily operations and decision-making of PRMS. In this regard the following are the potential core value words that were identified by the participants, along with draft statements and then the proposed new values and guiding principle statements for the PRMS.

#### Clustered Values:

Efficiency (3)  
Quality (3)  
Competency (2)  
Promptness (2)

Supportive (3)  
Cooperation (2)

Integrity (2)  
Honesty

#### Non-clustered Values:

Accountability (3)  
Consistency (3)

Sustainability (3)

Accessibility  
Flexibility  
Innovation

#### PRMS Draft Values and Guiding Principle Statements:

Draft # 1:

##### Professionalism

We strive to be a professional organization through the prompt, efficient delivery of quality regional services while maintaining honesty and integrity in all of our endeavours.

##### Supportive

We support our members by providing innovative and flexible services tailored to meet the needs of individual members.

##### Sustainability

Through regional collaboration and coordination we strive to remain a valued organization.

Draft # 2:

##### Professional

We are a professional organization that provides prompt, efficient delivery of quality regional services while maintaining honesty and integrity in all of our endeavours.

##### Supportive

We support our members by providing innovative and flexible services tailored to meet the needs of individual members.

##### Sustainable

Through regional cooperation, collaboration and coordination we will remain a valued organization.

## **PALLISER REGIONAL MUNICIPAL SERVICES**

### **VALUES AND GUIDING PRINCIPLES**

#### **Professional**

We are a professional organization that provides prompt, efficient delivery of quality regional services while maintaining honesty and integrity in all of our endeavours.

#### **Supportive**

We support our members by providing innovative and flexible services tailored to meet the needs of individual members.

#### **Sustainable**

Through regional cooperation, collaboration and coordination we will remain a valued organization

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## PART IV PRMS SERVICE AREAS ANALYSIS

### 1. INTRODUCTION

In consideration of the new Mission, Vision, and Values and Guiding Principles; analysis of the existing service areas of PRMS has been completed using the information from the questionnaire responses and the workshop summary.

During the workshop, the municipal representatives and PRMS staff discussed and analyzed the current and potential future Services that are and could be provided by PRMS over the three-year period extending from June 2010 to June 2013 using a set of defined questions.

#### **Analysis:**

##### Questionnaire Comments:

The following questionnaire responses are related to general service delivery functions of PRMS:

- *When Palliser has made a decision as to what services will be provided, the staff have to complement that service adequately, serve the members efficiently, effectively and timely manner*
- *Palliser should firstly be focused on improving on current service delivery before taking on any new initiatives or major clients. In ensuring that all staff positions are suitably filled and that current workloads and client expectations are met within established timelines, the company will be able to position itself to expand into new markets. If the company is not meeting its current client needs, there is no reason to take on any new initiatives.*
- *Services such as subdivision services, land use bylaw assistance, areas structure plans, general municipal plans and mapping should be the core services provided. Service presently is good. The permitting system is good.*
- *Palliser's main focus for the next three years will need to be on the delivery of planning services.*
- *Palliser's primary purpose is to serve as a planning agency for member municipalities. Any other services provided are "bonuses".*
- *Make sure that adequate staff are in place to meet client demands. Do not let the "little guys" suffer because priorities are placed on serving the needs of larger, more demanding clients*
- *Clarification of services provided, are they a regular service or a pay as you go service. If pay as you go, what are the fee structures?*
- *For planning services, we need to ensure we have a supply of adequately trained or experienced planners on staff. Staffing will be an increasingly difficult issue to address as the economy improves.*
- *Improve the core services presently offered by Palliser. Step back and take a realistic look at expanding services as to whether members really want that service. Improve your visibility to all of the members.*
- *Maintain existing services. Improve services around core, increase usage & support*
- *As a member, I'm looking for strong planning advise when required. Palliser needs to consult members and develop a schedule of planning document preparation required for each member municipality. Palliser also needs an ongoing municipal and Council presence to ensure that member organizations are pleased with service provided.*
- *Please focus on the core services. They are critical to the long term success of Palliser.*
- *Maintaining focus on existing core service delivery areas – don't drop the ball on current customer base because staff resources are being allocated towards a new initiate or a new client.*

## 2. SUBDIVISION SERVICES

Subdivision services are currently provided to all member municipalities. PRMS acts as the Subdivision Approving Authority for 26 of the 28 member municipalities and processes the subdivision files for Starland County and the M.D. of Acadia and provides recommendations for decision.

The subdivision service includes all aspects of the subdivision process including advice and discussions with applicants, statutory processing requirements including application review, development of professional map sketches, circulation process, subdivision report and recommendations, circulation of the decision documents and final endorsement procedures. Subdivision services also include attendance at appeal hearings when required.

### **Analysis:**

#### Questionnaire Comments:

Subdivision services are ranked as good to excellent by all responses received.

#### Workshop Results:

The workshop included targeted questions that were answered in small groups as follows:

What have been the positive results of the specific services provided by the PRMS to your municipality for this Service Activity?

- Prompt
- Dependable
- Affordable

Where are there changes required or improvements needed in the specific services provided by the PRMS to your municipality for this Service Activity?

- Increased staffing will improve turn around times
- Technical planning expertise
- Viable Funding

When you think about all of the services provided by the PRMS, what should be requisition-based service activities and what should be fee-for-service activities?

- Nothing was reported for this question

Regarding this Service Activity:

What specific services should be continued? Why is it important that these services be maintained?

- All current services should be maintained, as these are the current services that PRMS was founded on

What specific services should be deleted? Why are you recommending that these services be discontinued?

- No services were recommended to be deleted

### 3. LONG RANGE PLANNING – STATUTORY PLANS AND LAND USE BYLAWS

Long range planning services are currently provided to all member municipalities on a request for service basis. PRMS develops a list of the policy planning requests and provides the service as time permits. The requirements for long range planning are legislated by the Municipal Government Act. Every municipality is required to have a Land Use Bylaw to regulate and control development within the municipality according to statutory requirements. Statutory plans include Inter-municipal Development Plans, Municipal Development Plans, Area Structure Plans and Conceptual Schemes, and Area Redevelopment Plans. Municipalities with populations larger than 3,500 are required to have an MDP however, it is good planning practice for all municipalities to have an MDP to provide statutory policy for growth and development. The Land Use Bylaw provides the regulations to enforce that policy.

Services in this area provided by PRMS include:

- Land Use Map Amendments to Land Use Bylaws as required
- Map amendments to Municipal Development Plans, Area Structure Plans, Area Redevelopment Plans and Inter-municipal Development Plans as required
- Major Textual Amendments to Land Use Bylaws as required
- Major textual amendments to Municipal Development Plans, Area Structure Plans, Area Redevelopment Plans and Inter-municipal Development Plans as required
- Preparation and full-scale review of Municipal Development Plans
- Preparation and full-scale review of Land Use Bylaws
- Area Structure Plans
- Area Redevelopment Plans
- Inter-municipal Development Plans

#### **Analysis:**

##### Questionnaire Comments:

- *Planning Services – good, Bylaw (Land Use) revamping or updating – fair*
- *Service presently is good.*
- *We are pleased with service from PRMS – rank excellent*
- *Land Use Bylaw updates – Fair*
- *planning support – good*
- *Planning services – preparation of plans and technical documents (fair)*
- *Land use bylaw updating – perhaps more staff to assist*
- *For planning services, we need to ensure we have a supply of adequately trained or experienced planners on staff*
- *Palliser's main focus for the next three years will need to be on the delivery of planning services. Within that timeframe, the Provincial Government will have started to work on the Land Use Framework process for communities in the Red Deer basin. The new framework will require a review and amendment of all planning documents in the Palliser region, a task that will strain the planning resources of the organization. Palliser will need to focus on the large planning task that faces the organization.*
- *Improve the core services presently offered by Palliser*
- *timely service delivery needed*
- *Palliser needs to consult members and develop a schedule of planning document preparation required for each member municipality*

##### Workshop Results:

The service area was grouped into 'Municipal Advisory Services' and includes many aspects of PRMS operations. The workshop included targeted questions that were answered in small groups as follows:

What have been the positive results of the specific services provided by the PRMS to your municipality for this Service Activity?

Municipal Planning Services

- All of the services in this category are good

Long Range and Special Planning Advisory Services

- All of the services in this category are good

General Comments

- PRMS is locally available
- Relevant information
- Expertise, training
- Man hours
- Excellent service/sustainable

Where are there changes required or improvements needed in the specific services provided by the PRMS to your municipality for this Service Activity?

Municipal Planning Services

- There is a need for more training

Long Range and Special Planning Advisory Services

- There is a need for timely updates
- Economic planning is not required

General Comments

- While all of the services in this Service Activity were viewed as valuable the concern was expressed as to how the PRMS could afford to provide the staffing required.
- Clarification of "municipal services" to public and safety codes
- General need for training of PRMS staff
- Updating current website
- Subdivision fees does not cover the cost of the service (i.e. requisition based and fee-for-service)
- Land use change applications processed similar to subdivisions (fees established)
- Improve linkage from ACP/ASP to subdivision stage in a timely manner
- Need for common fee schedule for ACP
- Need for municipality training on ACPs requirement

When you think about all of the services provided by the PRMS, what should be requisition-based service activities and what should be fee-for-service activities?

- "Training" should be a fee-for-service activity

Regarding this Service Activity:

What specific services should be continued? Why is it important that these services be maintained?

- No comments were received for this question

What specific services should be deleted? Why are you recommending that these services be discontinued?

- No services were recommended to be deleted

What new services would you recommend be added to this Service Activity?

What would be the benefit(s) of adding these services?

- Landscape development/plans
- Website management and development
- Training PRMS staff

#### 4. COMMUNITY PLANNING ADVICE AND ASSISTANCE

PRMS provides advice to the member municipalities on all aspects of community planning. Advice and assistance is provided on a request basis, usually with a planning report and representation at Council meetings for discussion.

Services that provide advice and assistance currently include:

- Access to day-to-day advice on implementation of land use bylaws, statutory plans and other planning matters
- Advice to general public
- Consultation with Provincial Departments
- Road Closure Procedures
- Annexation Procoedures
- Municipal Government Act interpretation
- Attendance by professional planning staff at Municipal Planning Commission, Development Appeal Board and/or Council meetings to provide advice on planning matters
- Access to a professional staff trained in land use planning and such related fields as Digital Mapping, Design, Desk-Top Publishing, Drafting, Geography and Site Planning
- Mentoring of Development Officers and Clerical staff
- Training activities for regionally significant matters

#### **Analysis:**

##### Questionnaire Comments:

- *Planning Services – good, Bylaw (Land Use) revamping or updating – fair*
- *Service presently is good.*
- *We are pleased with service from PRMS – rank excellent*
- *Land Use Bylaw updates – Fair*
- *planning support – good*
- *Planning services – preparation of plans and technical documents (fair)*
- *Land use bylaw updating – perhaps more staff to assist*
- *For planning services, we need to ensure we have a supply of adequately trained or experienced planners on staff*
- *Improve the core services presently offered by Palliser*
- *timely service delivery needed*
- *Palliser needs to consult members and develop a schedule of planning document preparation required for each member municipality*

##### Workshop Results:

This service area was grouped into 'Municipal Advisory Services' and the comments are listed as part of Section 3.

## 5. MAPPING AND DATABASE SERVICES

Mapping is a very informative part of planning and other municipal functions. It is said that a picture represents a thousand words and in municipal functions this statement is definitely true. Municipal mapping is an important part of the services provided as a source of instant information for administration and councilors when making decisions.

Mapping and database services have evolved over time to become a larger part of the workload to develop and maintain the mapping requirements for the members. Palliser Regional Information Services Management (PRISM) began in 2005 as a special project to develop the expertise and provide leadership in the region for Geographic Information Systems (GIS). GIS has become a major initiative and most of the PRMS mapping functions are completed using GIS technology. GIS has limitless possibilities for the development of mapping databases that are linked to any or all pertinent municipal information such as land use, assessment and tax rolls.

Mapping and database services currently include:

- subdivision sketches
- mapping for statutory plans, LUB's, reports, etc.
- Access to digitized base maps
- Land Use Bylaw map updates and maintenance, registered plans, index map preparation and special maps
- Visual Aids
- Municipal Base Map Maintenance
- design services for municipal subdivision proposals
- Access to a registered plan data base
- Specialized GIS services such as MIMS
- Data Base (land use, demographic, etc..) maintenance and update

### **Analysis:**

#### Questionnaire Comments:

- *Another major internal factor is a vision for tech services. Many member municipalities have had to establish their own GIS and mapping services because of Palliser's inability to meet the client need for new technology. The establishment of a Prism working group is a good strategy, but Palliser has failed to lead in this area.*
- *GIS support services –excellent*
- *IT system support and web presence – good*
- *mapping support – excellent*
- *Mapping and GIS Services – Development of regional mapping and GIS services. Forward thinking in technology so the region can be leading edge in this technology area. (poor)*
- *Mapping services need an overhaul, and this could be achieved by conducting an independent review of services provided vs. those provided by other regional planning groups.*
- *Undertake a review of mapping, GIS and computer services currently being offered. If necessary, make changes.*
- *Municipal GIS. It's expensive and hard to compete as services such as Google Earth are available.*
- *The mapping and GIS area presents the largest issue. I believe we lack a vision and have fallen badly behind in this area. As noted, I think we need an independent overview of mapping services and this area could form the basis of additional services like on-line mapping, addressing etc.*
- *Improve services in mapping, GIS, training and member services.*

- *I do think a mapping services review is necessary, and specific expertise might be required.*
- *More planning expertise, less GIS*
- *I think the total GIS / GPS / IT / Web Presence w/Services & support probably needs more resources / manpower, but with a carefully thought out plan. It's the way of receiving & giving service in years to come.*
- *Mapping and GIS services need direction*

### Workshop Results:

What have been the positive results of the specific services provided by the PRMS to your municipality for this Service Activity?

- One platform (GIS)
- Expertise in-house
- Mapping visual representation of planning
- Printing service
- Printing (one) – inter-municipal maps
- Manipulating of data in-house (custom mapping)

Where are there changes required or improvements needed in the specific services provided by the PRMS to your municipality for this Service Activity?

- Linking all GIS Staff – Regional Forum
- GIS – What is core? – land use mapping? support for smaller municipalities?
- GIS/mapping – need for quality and consistency
- Need to be more proactive instead of reactive
- Need for increased identification of future needs
- Need for more expertise in-house
- Need to re-evaluate fees for mapping
- Need to update LUB maps in a more efficient and timely manner
- PRISM should be integrated into infrastructure mapping
- More usage by members based on training and have an open source and be user friendly
- Google Earth/NAV/TEQ
- Need for a regional routing system – rural addressing coordination
- Need for Local Dispatchment Fire – after hours call center
- Need for consistent fees
- Be ready to promote/target areas – need to find someone to help with this work
- Website support is necessary both from a maintenance standpoint and via giving it a new look and feel

When you think about all of the services provided by the PRMS, what should be requisition-based service activities and what should be fee-for-service activities?

#### Strategic Issues

- What do we charge for? - private versus municipal? fee or requisition?

#### Fee-for-Service

- Mapping for brochures

#### Requisition Services

- GIS advice
- Subdivision design
- Municipality Base Map
- Land Use Bylaw (LUB)
- Data Base
- Infra Mapping

\*It was noted that there is a need to look at member and non member rates for service

Regarding this Service Activity:

What specific services should be continued? Why is it important that these services be maintained?

- Continue all services, however need to determine what are or are not core services and which should be requisition or fee-for-service based services

What specific services should be deleted? Why are you recommending that these services be discontinued?

- No services were recommended to be deleted

What new services would you recommend be added to this Service Activity?

What would be the benefit(s) of adding these services?

- Infrastructure mapping – PRISM core
- Develop an ownership map with link for assessment

## 6. ADMINISTRATION OF SAFETY CODES

PRMS began the administration of Safety Codes January 1<sup>st</sup>, 1996. Safety Codes administration provides an important source of revenue to augment municipal requisitions. To provide this service, PRMS achieved accreditation in the building, fire, electrical gas and plumbing disciplines by drafting an Agency Quality Management Plan (QMP), which has been accepted by the Administrator of Certification and Accreditation. A new Uniform Quality Management Plan was recently adopted by all member municipalities in 2009. A regional system was adopted so that the burden of administering the provisions of the Safety Codes Act did not fall entirely on municipal administrations. Many municipalities felt that they neither had the time or expertise to monitor such a system.

### How the System Operates

- ◆ To operate the safety codes administration system, PRMS has established two contracts, one with the Town of Drumheller to provide the administration of the system and one with Superior Safety Codes to carry out the inspections. PRMS, through the Drumheller Town Office, handles the administration of the system: we receive the applications, issue the permits and collect the fees.
- ◆ Our administration then dispatches Superior Safety Codes Officers (SCO's) to conduct the inspections.
- ◆ The administration is also responsible to monitor SCOs and maintain contact with the Safety Codes Council (i.e. update changes to the Safety Codes Act).
- ◆ The Hanna office is mainly responsible for the overall financial management and accounting of the regional system which includes payment to the contracted inspection agency.
- ◆ All work however is carried out from the Town Hall in Drumheller under the PRMS name, utilizing a 1-800 number.
- ◆ The whole logic of the administration part of the fee is that there is a cost to operating such a system, and the intent is that this cost is carried by the people using the system (User Pay) and not the member municipalities.

### Analysis:

#### Questionnaire Comments:

- *Building Code Services – Delivery of safety codes services for the region at a competitive rate. (good)*
- *Safety Code Services – excellent*
- *Safety Codes services - Good*
- *Permits – poor*

#### Workshop Results:

What have been the positive results of the specific services provided by the PRMS to your municipality for this Service Activity?

- Generally like how the Safety Codes are being handled
- Excellent service

Where are there changes required or improvements needed in the specific services provided by the PRMS to your municipality for this Service Activity?

- Notification to the municipality when a permit has been issued (i.e. individually or monthly or quarterly report)
- Provide member training on permits
- Use consistent forms with the PRMS logo
- Provide training on web access of permit status
- Have online PDFs that can be completed
- Need for a clarification of guidelines/farm (agriculture) structure
- Need for training of PRMS staff on municipal requirements

## 7. SPECIAL PROJECTS

Special projects are those that do not comprise a service that is regularly provided by PRMS and may take the form of special studies, policy development or mapping projects. These projects are generally funded through Provincial grant opportunities or other arrangements with the municipalities/ agencies requesting the project.

Special projects that are currently in process include the following:

- Regional Profile and Communications Strategy creation and business plan update (Exploration Grant 1)
- Regional GIS and IT Service Strategy - user analysis, development of support program and action plan (PRISM II Exploration Grant)
- Oyen – Lyalta Rail Discontinuance Recovery Plan (RCAP Grant)
- Municipal Sustainability Plan Pilot Project (AUMA Contract)

### **Analysis:**

#### Questionnaire Comments:

- *Palliser should continue its core services while moving ahead on services that will involve the long term interests of communities*
- *Palliser should firstly be focused on improving on current service delivery before taking on any new initiatives or major clients. In ensuring that all staff positions are suitably filled and that current workloads and client expectations are met within established timelines, the company will be able to position itself to expand into new markets. If the company is not meeting its current client needs, there is no reason to take on any new initiatives.*
- *Palliser's primary purpose is to serve as a planning agency for member municipalities. Any other services provided are "bonuses".*
- *Maintain existing services. Improve services around core, increase usage & support*
- *Regional Enforcement services – as many small/rural areas do not have this type of service. It could also recover costs.*
- *An effort must be made quickly to look at "additional" services that could be provided on a profit basis. For example: landscape planning services, web page development for smaller communities, ICSP Plan Preparation, are examples of services that could be added as an option for fund generation.*
- *Environmental consulting (to municipalities)*
- *Additional fee-for-service initiatives could be introduced as long as they fit within the scope of PRMS staff skill base and as long as they didn't cause current service delivery capabilities to suffer.*
- *Regional Geo Database Center, value added data, A "dispatch" and/or "tracking" centre for Fire Services, Energy and Private Business "for work alone legislative requirements"*
- *I think we need to focus on the current planning needs before the organization moves to additional service delivery. But, some services were noted above, and I like to potential to develop ownership based mapping that includes an assessment link for residents.*

#### Workshop Results:

What have been the positive results of the specific services provided by the PRMS to your municipality for this Service Activity?

- Newsletter communication
- AUMA (RADF) funding for Sustainability Plan creation
- Leadership/oversee start of Short Line Railway group
- We can utilize grant programs to fund our services
- We have been able to use PRMS staff to qualify for funding (i.e. sustainability plans)
- PRISM was good to get the concept out, however follow-up was lacking

Where are there changes required or improvements needed in the specific services provided by the PRMS to your municipality for this Service Activity?

- What is the Regional/Partnership Opportunities Review project all about?
- PRISM was good to get the concept out, however follow-up was lacking

When you think about all of the services provided by the PRMS, what should be requisition-based service activities and what should be fee-for-service activities?

Requisition Projects

1. Regional partnership opportunities review (Grant funding received for 2010 version)
2. Production of a regional profile (Grant funding received for 2010 version)
5. Coordination of a Regional Development Officer's Association
8. Ongoing production of a regional development based newsletter

Fee for Service Projects

3. CN Rail Discontinuance (RADF Funding)
4. Consideration of a GIS/IT Field Officer Program (Grant Funding declined)
6. Sustainability Plan preparation (AUMA Pilot Project Funding)
7. Palliser Regional Information Systems Management (PRISM) Enhancement Project (Provincial Grant project)

Regarding this Service Activity:

What specific services should be continued? Why is it important that these services be maintained?

- Regional newsletter – it is a good communication tool
- CN Rail – passionate people/economic development opportunities
- PRISM – good municipal tool

\* A comment was made that it is important for PRMS to deliver core services first and then use remaining resources for extra services etc.

What specific services should be deleted? Why are you recommending that these services be discontinued?

- No services were recommended to be deleted

What new services would you recommend be added to this Service Activity?

What would be the benefit(s) of adding these services?

- Training for new councilors was recommended as a new project. Training topics to include subdivision appeal board, governance, coordination of ARB training for local administrators etc.
- JARB training locally
- GIS/IT Field Assistant
- Sustainability Implementation
- Grant Research Coordinator

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## **PART V STRATEGIES FOR SUCCESS**

### **1. SERVICE AREAS - RESULTS**

The service areas analysis provides a vast amount of information to disseminate and develop into an action plan that will allow PRMS to achieve our goals while keeping in mind the organizational Mission, Vision and Values and Guiding Principles. Part V will take the information developed and define the core and fee-for-service functions, the resources needed to achieve the service expectations of our municipal members and the funding requirements in consideration of certain criteria and an acceptable services and staffing scenario.

### **2. PRMS CORE SERVICES - DEFINED**

The core services of PRMS are those that the organization was founded on and that are provided to all member municipalities. The responses from the strategic plan process recognized the need to define the core services of PRMS to ensure all members are aware of the services available and the structure for delivery of those services. The intention of defining the core services is to ensure that all member municipalities and PRMS administration are aware, and in agreement, of the services and structure in place. Defining the core services also provides a basis of accountability for the services that PRMS is expected to deliver to the members. These services may be provided on a user-pay (subdivision, land use amendment applications) or municipal requisition basis (Long Range Planning, Planning Advice and Assistance and Mapping/ database functions). The core services are to be requisition based services unless otherwise noted below. This is to ensure that the services are sufficiently funded as required to meet the service level expectations of the members.

***In consideration of the information received from the strategic planning questionnaire and session the following are considered the core services of PRMS:***

#### **SUBDIVISION SERVICES**

##### **(A CORE SERVICE CURRENTLY FUNDED BY FEES AND REQUISITIONS BUT IS TO BE REDEVELOPED AS USER-PAY WITH A NEW FEE SCHEDULE FOR 2011)**

- Act as subdivision authority on behalf of municipality
- Processing of applications for subdivision approval and finalization in accordance with legislative requirements
- Advice to municipal residents making application for subdivision approval
- Advice to municipality: subdivision reports and recommendations
- Inform applicants and agencies of decisions
- Review of subdivision designs proposed by the municipality
- Attendance at Appeal Hearings on subdivisions processed by PRMS
- endorsement of register able documents

#### **LONG RANGE PLANNING – STATUTORY PLANS AND LAND USE BYLAWS**

- Land Use Map Amendments to Land Use Bylaws as required (Developer initiated is fee-for service)
- Statutory Plan map amendments to Municipal Development Plans, Area Structure Plans, Area Redevelopment Plans and Inter-municipal Development Plans as required (Developer initiated is fee-for service)

- Major Textual Amendments to Land Use Bylaws as required (Developer initiated is fee-for service)
- Major textual amendments to Municipal Development Plans, Area Structure Plans, Area Redevelopment Plans and Inter-municipal Development Plans as required (Developer initiated is fee-for service)
- Preparation and full-scale review of Municipal Development Plans (a strategy with a five year rotation to be developed to ensure accountability and up-to-date MDP's)
- Preparation and full-scale review of Land Use Bylaws (a strategy with a five year rotation to be developed to ensure accountability and up-to-date MDP's)
- Area Structure Plans (Municipality initiated) (Developer initiated is fee-for service)
- Area Redevelopment Plans
- Inter-municipal Development Plans

### **COMMUNITY PLANNING ADVICE AND ASSISTANCE**

- Access to day-to-day advice on implementation of land use bylaws, statutory plans and other planning matters
- Advice to general public
- Consultation with Provincial Departments
- Municipal Government Act interpretation
- Attendance by professional planning staff at Municipal Planning Commission, Development Appeal Board and/or Council meetings to provide advice on planning matters
- Access to a professional staff trained in land use planning and such related fields as Digital Mapping, Design, Desk-Top Publishing, Drafting, Geography and Site Planning
- Mentoring of Development Officers and Clerical staff
- Training activities for regionally significant matters (i.e. Councilor/ Governance Training coordination)

### **MAPPING AND DATABASE SERVICES**

- Subdivision sketches
- Mapping for statutory plans, LUB's, reports, etc.
- Access to digitized base maps
- Land Use Bylaw map updates and maintenance, registered plans, index map preparation and special maps
- Visual Aids
- Municipal Base Map Maintenance
- design services for municipal subdivision proposals
- Access to a registered plan data base

### **SAFETY CODES ADMINISTRATION (A CORE SERVICE BUT IS ALSO USER PAY)**

#### **COMMUNICATIONS**

- Fieldnotes newsletter
- regional communications of significant topics (LUF, ALSA, etc.)
- Coordination of a regional development officer's association/ CAO working group

### **3. PRMS FEE-FOR-SERVICE ACTIVITIES - DEFINED**

The fee-for-service activities are those that are not required by all member municipalities or that are special projects where grant funding is made available. The types of services that are considered fee-for-service would include any new services that are requested by specific municipalities and would follow a user-pay system. Any new services requested should be reviewed using the 2004 Regional Projects Business Process Template to determine the viability, resource needs and funding necessary to provide the service effectively. A decision on service provision would follow a thorough review by PRMS to develop a business model followed by agreement of those that would receive the service. An example of a service that has been requested but would not likely be utilized by all member municipalities is bylaw enforcement or website management and development.

***In consideration of the information received from the strategic planning questionnaire and session the following are considered the user-pay services of PRMS:***

#### **LONG RANGE PLANNING – STATUTORY PLANS AND LAND USE BYLAWS**

##### **(AMENDMENTS TO BE PROCESSED SIMILAR TO SUBDIVISION APPLICATIONS ON A USER PAY BASIS AS PART OF A NEW FEE SCHEDULE IN 2011)**

- Municipal Research and Policy Development (i.e. Addressing Policy, Recreation Plans, Water Conservation Policy)

#### **COMMUNITY PLANNING ADVICE AND ASSISTANCE**

- Assistance with Road Closure procedures
- Assistance with Annexation procedures
- Preparation of offsite levy bylaws
- Coordinate services of a Regional Appeal and/ or Assessment Review Board

#### **MAPPING AND DATABASE SERVICES**

- Specialized mapping for plans, reports, tourism brochures, etc.
- Specialized GIS services such as Infrastructure mapping, Ownership based mapping with link to assessment, etc. (Infrastructure mapping ranked at the top of tech services by participants as a service need)
- Data Base (land use, demographic, etc..) maintenance and update (i.e. Regional Profile)
- Website management and development
- Landscape Design/Plans

#### **SPECIAL PROJECTS AND SERVICES**

- Regional Partnership Opportunities Review
- Regional Profile Development
- Economic Development (i.e. Rail Discontinuance Recovery Project Management and coordination)
- GIS/ IT Field Officer
- Sustainability Plan preparation and implementation
- PRISM Enhancement Project
- Grant Research Coordinator/ Writer
- Other specialized services that would not fit within the normal operations of a planning agency

#### 4. RESOURCE NEEDS TO ACHIEVE THE DESIRED RESULTS IN SERVICE DELIVERY

As determined previously in this plan, PRMS is a knowledge intensive business. Municipal Planning, research, mapping and database development all require educated personnel to achieve the desired results. A persistent problem that has occurred over time is the lack of human resources to meet the service needs of the member municipalities. This has led to long wait times, especially in the statutory policy plans and Land Use Bylaw review functions. The action plans that follow will attempt to rectify these problems with 'right-sized' staffing to ensure we meet the service delivery requirements of the member municipalities with a strategic process.

#### 5. SUSTAINABLE FUNDING REQUIREMENTS – CORE VS. FEE-FOR SERVICE

Core services are defined above as the service activities that the organization was founded on and that are provided to all member municipalities. These services need to be sufficiently funded to ensure PRMS has the necessary resources and expertise to provide the desired results. Funding for core services will be developed to account for the costs involved of operating in a similar role as a municipal planning department. **There needs to be separation and accountability for the various services provided to ensure that special projects are not utilized to subsidize the regular planning functions of the agency. This situation occurred over the past 5 years whereby PRMS underfunded the regular planning functions and relied on grants to subsidize those revenue needs.** This meant most of the PRMS human resources were dedicated to meeting the obligations of grant agreements with little time available to meet the major planning needs of the members such as statutory plan and land use bylaw review services. The intention is to rectify this problem taking into account the responses received from the members that our core services are of prime importance to achieve as per the following comments:

- *Palliser's primary purpose is to serve as a planning agency for member municipalities. Any other services provided are "bonuses".*
- *It was emphasized that there still is a need for the PRMS to reconcile what are requisition based services and what are fee-for-service based services.*

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## **PART VI IMPLEMENTATION**

### **1. Development of Action Plans to Ensure Effective and Affordable Service Delivery**

The next step in the strategic planning process is to develop action plans in the key service areas to adequately meet the objectives and requirements of the member municipalities. The following pages will determine how to meet the service delivery objectives as efficiently and effectively as possible for planning, mapping, safety codes and other regional opportunities.

## Palliser Regional Municipal Services - Action Plan

**Service Activity:** Subdivision Services

**Specific Service:** Delivery of the full scope of Subdivision Services effectively and in accordance with all statutory requirements on a user pay basis whereby the developer pays the costs to provide the service

**Solution:  
(One solution per sheet)** Development of a fee schedule that takes into account the average number of applications annually and the costs of human and other resources required to deliver the service. The application fees schedule to be established from these results.

**Who will do the work?** CEO to develop a draft fee schedule for 2011 to be reviewed by the Executive Review Board and approved by the Board of Directors.

**When will the work be done?** During Budget deliberations in Fall 2010

**What resources will be required?** Human resources/ time

**How will you measure success?** The subdivision fees cover the costs to provide subdivision services in 2011.

## Palliser Regional Municipal Services - Action Plan

**Service Activity:** **Municipal Advisory Services**

**Specific Service:** Statutory Plan and Land Use Bylaw Development/ Review

**Solution:**  
**(One solution per sheet)** A regular process to be established whereby each member municipality will have a timely review of all statutory planning and land use bylaw needs on a minimum 5 year rotational basis. PRMS to be accountable for accurate and reliable Plan/ LUB development on a timely basis.

**Who will do the work?** CEO to develop a 5 year rotational schedule considering the members with the most outdated statutory plans and LUB's to be completed first. The schedule to be reviewed by the Executive Review Board and approved by the Board of Directors.

The plan and LUB reviews will be completed by a long range planner and the CEO/ Senior Planner.

**When will the work be done?** A 5 year rotational schedule developed and all resources in place by January 2011. The Statutory Plans and LUB reviews as per the adopted schedule to begin in January 2011.

**What resources will be required?** A Long Range Planner/ Financial resources from requisition base to cover the costs to provide the level of service.

**How will you measure success?** The 5 year rotational schedule is met with all municipalities having the necessary statutory plans and LUB developed or reviewed/ updated as needed.

## Palliser Regional Municipal Services - Action Plan

**Service Activity:** **Municipal Advisory Services**

**Specific Service:** Statutory Plan and Land Use Bylaw Amendments

**Solution:**  
**(One solution per sheet)** An application form and process developed to provide amendment services for the member municipalities similar to the subdivision services structure while meeting all statutory requirements of the process including application, circulation, planning reports and attendance at public hearings similar to the services provided by a municipal planning department.

**Who will do the work?** PRMS staff to develop an application form, process and fee schedule similar to the subdivision process.

Information provided to, and agreement from, member municipalities to provide the service.

**When will the work be done?** Application forms, process and services agreement completed by 2010 year end to begin providing the service in this manner in 2011.

**What resources will be required?** Human resources – most aspects of the amendment service are already provided without a defined structure and fee schedule.

**How will you measure success?** The amendment service structure is followed in 2011 and beyond.

## **Palliser Regional Municipal Services - Action Plan**

**Service Activity:** **Mapping and Database Services**

**Specific Service:** PRISM Group/ GIS Leadership

**Solution:**  
**(One solution per sheet)** PRMS to provide the regional leadership necessary to implement the vast potential for GIS uses in the municipal framework. A succinct regional vision and strategy to be developed that defines the role of PRMS in municipal GIS development. The PRISM group to be re-established and regular forums held where communication, training and information dissemination is completed effectively.

**Who will do the work?** PRMS staff, in collaboration with the member municipality PRISM representatives, to complete a user analysis, training and development recommendations and implementation plan as part of the PRISM Enhancement Exploration Grant Project to ensure the objectives and needs of the member municipalities are effectively met for Municipal GIS potential now and in the future.

**When will the work be done?** The exploration grant project and future strategy to be completed by March 2011 and to provide the basis for future GIS/ PRISM group development.

**What resources will be required?** Human resources – the comments received through the strategic plan process have established that leadership and communication in this service area is lacking. Additional technical staff may be required to meet the objectives and requirements of the member municipalities.

**How will you measure success?** A long term strategy is developed for GIS uses in the municipal context and PRMS role is defined as leadership or assistance to member municipalities.

## Palliser Regional Municipal Services - Action Plan

**Service Activity:** Mapping and Database Services

**Specific Service:** Mapping quality and consistency

**Solution:** Mapping has been inconsistent over the past few years with quality concerns including up-to-date legal and land use data and inconsistent or unprofessional appearance of final printed products sent to member municipalities.  
**(One solution per sheet)**

**Who will do the work?** PRMS technical staff to develop a mapping updates procedure whereby the base map and index map data, addressing, land use and other layers remain current.

**When will the work be done?** The procedure will be developed immediately and communicated to the member municipalities. The process to ensure all municipal mapping is current will begin when the procedure is finalized.

A standard municipal mapping layout format was addressed in early 2010 to ensure consistency and professional appearance of mapping products.

**What resources will be required?** Human resources/ time

**How will you measure success?** The member municipalities are satisfied with the professional mapping products provided by PRMS. The procedure is followed by all member municipalities to ensure that mapping products remain up-to-date in the long term.

## Palliser Regional Municipal Services - Action Plan

**Service Activity:**

**Fee Structure**

**Specific Service:**

A fee schedule to be developed including hourly rates for fee-for-service or user pay initiatives such as mapping products and special projects

**Solution:  
(One solution per sheet)**

Develop a fee structure representative of the services provided on a fee-for-service or user pay basis to ensure that member municipalities are receiving a fair rate in consideration of PRMS operating as a not-for-profit organization and differentiate between member rates and non-member rates.

**Who will do the work?** PRMS administration to develop a fee structure representative of the organization as a not-for-profit agency to be reviewed by the ERB and approved by the Board of Directors.

**When will the work be done?** A fee structure developed and completed prior to the 2011 budget deliberations.

**What resources will be required?** Human resources/ time

**How will you measure success?** The member municipalities receive fair rates with a cost recovery model to provide the service/ product consistent with our mandate as a not-for-profit member municipality owned company.

## Palliser Regional Municipal Services - Action Plan

**Service Activity:** Safety Codes Administration

**Specific Service:** Permit Basics Training

**Solution:**  
**(One solution per sheet)** Training of member municipality front-line staff to have the necessary knowledge to be able to answer the basic building permit related questions when an applicant approaches the municipal offices for application requirements.

**Who will do the work?** PRMS administration to coordinate basic training events for member municipality staff.

**When will the work be done?** A training plan developed as soon as possible with the necessary training personnel and appropriate materials and dates determined

**What resources will be required?** Human resources/ time/ funding if training personnel are external

**How will you measure success?** Staff of the member municipality's ability to answer applicant's basic safety codes related questions is increased. Applicants are provided with the correct information and forms with a decrease in service related complaints.

## **Palliser Regional Municipal Services - Action Plan**

**Service Activity:**                    **Safety Codes Administration**

**Specific Service:**                    Application Forms

**Solution:**                                Forms to be consistent in appearance and contain the PRMS logo  
**(One solution per sheet)**                and research into the potential for online application forms.

**Who will do the work?** PRMS administration to review existing forms for consistency and research the potential for online forms.

**When will the work be done?** Fall 2010

**What resources will be required?** Human resources/ time/ funding if external development of online forms

**How will you measure success?** Consistent application forms are provided to and used by all member municipalities. Ease of access to forms is available to simplify the application process requirements.

## Palliser Regional Municipal Services - Action Plan

**Service Activity:** **Other Services/ Special Projects**

**Specific Service:** All additional projects beyond the core services

**Solution:**  
**(One solution per sheet)** Ensure that the core services as described in this plan are effectively and efficiently provided before additional services are considered. Ensure that when additional projects/ services are developed that they are sufficiently funded to be user-pay.

**Who will do the work?** PRMS administration.

**When will the work be done?** Ongoing

**What resources will be required?** Direction on core vs. other services/ projects

**How will you measure success?** The member municipalities are satisfied with the core services provided. Any additional services/ projects considered shall be user-pay funded.

**----- APPENDICES -----**

## Appendix 'A'

### STRATEGIC PLANNING QUESTIONNAIRE AND SURVEY

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1. **Considering existing and potential services, number of employees/ company size, what should our company look like in three years? Share any thoughts on where you think we should be headed and what we will look like once we've arrived.**
  - *I don't know*
  - *When Palliser has made a decision as to what services will be provided, the staff have to complement that service adequately, serve the members efficiently, effectively and timely manner*
  - *Have no idea*
  - *Palliser should continue its core services while moving ahead on services that will involve the long term interests of communities*
  - *Palliser should firstly be focused on improving on current service delivery before taking on any new initiatives or major clients. In ensuring that all staff positions are suitably filled and that current workloads and client expectations are met within established timelines, the company will be able to position itself to expand into new markets. If the company is not meeting its current client needs, there is no reason to take on any new initiatives.*
  - *A growing corporation providing cost effective solutions to members needs through existing and future initiatives.*
  - *Palliser's main focus for the next three years will need to be on the delivery of planning services. Within that timeframe, the Provincial Government will have started to work on the Land Use Framework process for communities in the Red Deer basin. The new framework will require a review and amendment of all planning documents in the Palliser region, a task that will strain the planning resources of the organization. Palliser will need to focus on the large planning task that faces the organization.*
  
2. **List three external or internal factors that you believe could hinder our growth or your vision of our future.**
  - *Money may be an issue.*
  - *The only thing I can see hindering your growth is the ability to attend and deal with requests on a timely basis.*
  - *Provincial government policy ,local municipal autonomy, regional services are hard to attain as even in the smallest region, one answer or policy does not necessarily fit.*
  - *Have no idea*
  - *Water availability, economic viability, political change*
  - *Any number of factors could influence the future vision for Palliser, including economic downturns, loss of Provincial funding sources, additional legislative requirements, and many others.*
  - *Internal; availability of "right sized" staff. Members with "small community" thinking. We all need each other and are a large community. Current major municipalities withdrawing support.*  
*External; availability of "right sized" staff*
  - *While the economy has been somewhat strained over the past year, I believe we will see an Albertan recovery. This will lead to a number of growth issues like: attracting employees, paying competitive salaries and difficulties in maintaining a trained and competent staff. Another major internal factor is a vision for tech services. Many member municipalities have had to establish their own GIS and mapping services because of Palliser's inability to meet the client need for new technology. The*

establishment of a Prism working group is a good strategy, but Palliser has failed to lead in this area.

**3. What services do you expect from PRMS? Please rank the level of service you are currently receiving in these areas (Poor, Fair Good, Excellent).**

- Service is Excellent
- Planning Services – good, Bylaw (Land Use) revamping or updating – fair, Assessment Review Board – good, Permits – poor
- Services such as subdivision services, land use bylaw assistance, areas structure plans, general municipal plans and mapping should be the core services provided. Service presently is good. The permitting system is good.
- We are pleased with service from PRMS – rank excellent. The questions on this survey are silly – except for the needs assessment – I have only sent the pages I had any answer for.
- Planning assistance/leadership – excellent, safety codes admin, networking/collaboration
- Palliser’s primary purpose is to serve as a planning agency for member municipalities. Any other services provided are “bonuses”. Most recently, we have received services in the following areas:

**Satisfaction level:**

Safety Codes services	Good
Land Use Bylaw updates	Fair
Subdivision services	Fair
MIMS implementation	Good

- Safety Code Services – excellent, GIS support services –excellent, subdivision services – excellent, IT system support and web presence – good, mapping support – excellent, planning support – good
- 1. Planning services – preparation of plans and technical documents (fair)
- 2. Planning services – advisory services / planning advise to Councils and Municipal Planning Commissions (fair)
- 3. Long Range Planning – advise and expertise on major planning initiatives (ie. Land Use Framework) (fair)
- 4. Representation – Palliser represents the region on planning issues of interest (eg. Location of major power lines, development of plans for the Red Deer River basin. Rail Retention initiative etc.) (good)
- 5. Mapping and GIS Services – Development of regional mapping and GIS services. Forward thinking in technology so the region can be leading edge in this technology area. (poor)
- 6. Regional Planning – Analyzing and understanding the region, so regional weaknesses can be identified and lobbied for at a regional level. For example, looking at population trends regionally and their likely impact on the education system. (poor)
- 7. Building Code Services – Delivery of safety codes services for the region at a competitive rate. (good)
- 8. Public Relations – All things from an active web page to ongoing efforts to educate the general public on the value of planning services delivered. This could be through one on one consultations, forums for Councils and staff on planning issues to providing a library of planning process advise. (poor)
- 9. Financial Management – Maintaining a strong accountability to the member municipalities, and reporting same. (fair)

**4. If there are areas not up to your expectations, what recommendations would you have to increase the level of service in those areas?**

- No
- Land use bylaw updating – perhaps more staff to assist, Permits – there has been no information or direction as to how or what we are supposed to do.

- *Improved or faster turnaround time for subdivision applications*
  - *N/A*
  - *Make sure that adequate staff are in place to meet client demands. Do not let the “little guys” suffer because priorities are placed on serving the needs of larger, more demanding clients*
  - *Clarification of services provided, are they a regular service or a pay as you go service. If pay as you go, what are the fee structures?*
1. *For planning services, we need to ensure we have a supply of adequately trained or experienced planners on staff. Staffing will be an increasingly difficult issue to address as the economy improves.*
  2. *For delivery of advisory services, the more junior staff (non-planners) need a mentor or over-riding supervisor they can consult with to ensure that the advice provided is consistent and meets legislative requirements.*
  3. *Effective long range planning and some of the other areas like regional planning and public relations likely will require additional staffing to improve.*
  4. *Our newly formed Administrative Advisory group will help to identify new trends or issues that will need to be addressed.*
  5. *Mapping services need an overhaul, and this could be achieved by conducting an independent review of services provided vs. those provided by other regional planning groups.*
  6. *Financial management and overall management has improved greatly over the last few months, and I believe the Administrative Group is key to ensuring that the reporting and liaison functions are working effectively.*

**5. How do the member municipalities perceive PRMS? What are they really saying about PRMS when we aren't around?**

- *We do not have any complaints and have not heard any.*
- *They like the friendly staff and willingness to help.*
- *Is the value of service meeting the expectation of the members for what they are paying in requisitions? Some things Palliser was involved in do not match needs of everyone.*
- *Palliser is very highly regarded however some services may lack some resources - due to demand*
- *PRMS serves its purpose, but it could be doing a much better job of it*
- *I personally have not heard any negative comments from my “Peers”*
- *I think that Brad has done a good job of increasing communications with member municipalities, and he's working hard to correct some previous administrative short-falls. There are lots of concerns about the mapping and GIS services.*

**6. How would you characterize communications from PRMS? Direct? Insufficient? Adequate? How could we improve?**

- *Very good.*
- *Communications are good.*
- *Hit and miss. Sometimes if the subject is a priority we get inundated with information and then other times it's not there. Need more consistency with all communication.*
- *Communication is very good – we hear back on inquiries very soon after we make contact. I appreciate the various modes that are used.*
- *Communications are at times good, and at others non-existent. In a word, communications are inconsistent. The Web Site is dated and not particularly user friendly.*
- *Direct when needed, improvement could be more “face to face” member contact/visits to assess if any one member is in need of any services within the scope of the services offered and to get input on new services we might want to develop.*
- *Most municipal staff now rely on a website interface for information. Ironically Palliser's website is third world at best. The Board of Director's listing doesn't even fit in the box?*

*It's very poor for information dissemination, and also reflects on the mapping, GIS, and computer services division*

**7. What do you believe should be the Top three strategic initiatives next year? Be specific, but only list the top three most important for the future success of the company.**

- *I don't know*
- *Improve the core services presently offered by Palliser. Step back and take a realistic look at expanding services as to whether members really want that service. Improve your visibility to all of the members.*
- *Planning, Safety Codes, networking/advocacy*
- *1. Improving customer satisfaction*  
*2. Insuring adequate staffing to meet client requirements*  
*3. Prioritizing opportunities for new service initiatives*
- *Maintain existing services. Improve services around core, increase usage & support*
  1. *Communicate with members. Visit all municipalities and attend a Council meeting to see if they are happy with the planning services offered. Take notes.*
  2. *Undertake a review of mapping, GIS and computer services currently being offered. If necessary, make changes.*
  3. *Update the requisition formula to ensure that the municipal requisitions are in compliance with the approved funding format. Educate members on why requisitions are changing and use additional funding raised to secure one additional staff member that can assist with long range planning, representation and public relations efforts.*
  4. *Participate in the Municipal Affairs internship program to get a new planning student into the mix. Palliser should also look at a high school program to try and get young Hanna area residents interested in planning.*

**8. What are the three primary strengths of our company?**

- *Service*
- *Friendly staff, knowledgeable, timely in providing answers*
- *People, I think the people you have working are good. The membership if all involved can do a lot.*
- *The diversity of the membership, the range of services, the Palliser Team.*
- *1. Grass Roots approach – services are determined by the members*  
*2. Approachable staff – willing to make the effort to respond to and answer inquiries*  
*3. Location – appropriately located at centre of geographic region*
- *Staff is knowledgeable of the area. Staff appears to have most of the skill sets & knowledge required. Corporation is member driven*
  1. *A long history of regional co-operation between urban and rural, big and small municipalities.*
  2. *A common bond of living in a rural area with few people.*
  3. *Strong support for the concept of regional service delivery that makes sense for the region.*

**9. What areas of PRMS are the weakest? How could we improve? Please provide specifics.**

- *I don't know*
- *Perhaps a list of available services could be made and the names of those who deal with that service, so I know what else I can come to you for*
- *I don't see a common vision of all the members. Give front line staff more autonomy to finalize a decision*
- *Municipal GIS. It's expensive and hard to compete as services such as Google Earth are available.*
- *Historically speaking – timely service delivery. We got lost in the paper shuffle on more than one occasion during the past 2-3 years on various projects. See above comments on how we can improve*

- Referring back to question #4; the need for a checklist of services provided and review often to gauge & improve usage
- The mapping and GIS area presents the largest issue. I believe we lack a vision and have fallen badly behind in this area. As noted, I think we need an independent overview of mapping services and this area could form the basis of additional services like on-line mapping, addressing etc.
- Some additional services like regional representation (Land Use Framework), regional planning and research and public relations and training efforts could be effectively delivered but likely would require additional staffing.

**10. What geographic areas should we service? Should we actively recruit additional members/ shareholders?**

- However much you can handle without reducing service to other areas.
- The current area is quite large. Look after what you have before embarking in any type of expansion.
- It seems to me that the current membership has been/provided a strong core for services. I don't believe that expansion would be beneficial at this time.
- I see no need to pursue a larger client base at this time.
- First assess local needs vs goals, then if there is a benefit to ourselves & any future partners, grow with that in mind...win, wins are always better.
- The area of service is reasonable now. We should only recruit members with similar issues (rural, sparse population etc.) Maybe focus on superb services for the existing member group.

**11. If you were named CEO of PRMS, what three programs, projects or initiatives would you launch immediately? Why?**

- I don't know.
- Identify the core services, set goals as to how the core services will be provided to the members, set a long term vision.
- Regional Enforcement services – as many small/rural areas do not have this type of service. It could also recover costs.
- Uncertain as to how to answer this question – I would launch only projects that the member base was interested in pursuing. Just because I think it's a good idea doesn't mean it works for the membership.
- 1<sup>st</sup>, are we doing what we were tasked to do from the onset. Are we overstaffed or underfunded. Then, a movement to more IT support services / delivery systems would be in keeping with trends.
- I would immediately do the things identified in #7 above. I do think ongoing work with the C.A.O. Advisory group will help the CEO to focus on what is important.

**12. If you owned 100% of PRMS, and all profits or losses were yours alone, what changes would you immediately make?**

- I don't know.
- Ensure that major stakeholders (highest # of applications) were getting good enough service to justify potential fee increases.
- I would address customer satisfaction issues – unless there is an improvement on past experience, there wouldn't be a lot of profit to worry about.
- I personally cannot look at PRMS that way; the services supplies were needed by the "local governments" and it was best to deliver them on a co-operational / regional basis. I believe all profits and/or losses are our own. We are a not-for-profit corporation.
- I would make sure the funding formula is properly applied so that additional assessment growth and population growth is captured annually. Make sure municipal members know

*that their Planning Requisition is an eligible expense for MSI Operating expense grants. Member requisitions need to cover the costs of service delivery.*

- *Improve services in mapping, GIS, training and member services. Seminars in SDAB operations or Understanding your Land Use Bylaw could be offered Province wide as a revenue source.*
- *Make sure planning and safety codes permit fees are representative and are at least cost neutral.*

**13. What areas of expertise do you feel we are lacking?**

- *I don't know.*
- *There doesn't seem to be any obvious lack of experience or qualification.*
- *None that I can identify*
- *I think we might be one Planner short at Palliser. The organization traditionally had a Director and Senior Planner along with junior staff members. We don't have the Senior Planner on staff anymore, and this position would assist in several areas. I do think a mapping services review is necessary, and specific expertise might be required.*

**14. What constitutes "good service" in the minds of our members?**

- *Prompt service and accurate service*
- *Friendly, patient staff who are willing to help or at least direct you to someone who can help.*
- *Value for the price of membership, quick response to questions or information, understanding of the members' concerns or problems.*
- *Reasonable response time to requests, correspondence and support on safety codes/planning initiatives.*
- *- Timely response to inquiries/submissions*
  - *Knowledgeable in key areas of inquiry*
  - *Willing to work for the client and to satisfy all requirements*
- *Our members identified needs addressed with positive outcomes.*
- *As a member, I'm looking for strong planning advise when required. Palliser needs to consult members and develop a schedule of planning document preparation required for each member municipality. Palliser also needs an ongoing municipal and Council presence to ensure that member organizations are pleased with service provided.*

**15. Identify the specific positions we need to fill, add or replace to improve our company.**

- *I don't know.*
- *I do not know all the people who work at Palliser to make a comment on this.*
- *More planning expertise, less GIS*
- *Not certain if I am qualified to answer this one..... The recent change in management may be the solution to all of the above issues*
- *I think the total GIS / GPS / IT / Web Presence w/Services & support probably needs more resources / manpower, but with a carefully thought out plan. It's the way of receiving & giving service in years to come.*
- *I think a Senior Planner should be added to the staffing levels currently provided. Changes might be needed in the mapping / technology area to make the organization more effective*

**16. Suppose you were given 90-days of unlimited authority to make changes, add any staff, pursue any initiative or eliminate anything or anyone. Nothing was off limits. The monetary results of your decisions or actions would be measured over an 18 month period and any profits resulting from your actions would be yours alone. What exactly would you do? Please remember that simply eliminating people doesn't help if our members aren't**

**delighted and if the work doesn't get done. So what are you going to do to improve the business while also keeping the members happy?**

- *I am not sure.*
- *Add planning resources, increase fees, introduce regional enforcement (on a subscription basis – cost recovery plus)*
- *Sorry – this is a loaded question, and I don't think I can answer this in a meaningful way*
- *We live this every day, although I am a partner in this business, I have my own "local government" to run.*

• *I would focus on the issues identified in question #7. An effort must be made quickly to look at "additional" services that could be provided on a profit basis. For example: landscape planning services, web page development for smaller communities, ICSP Plan Preparation, are examples of services that could be added as an option for fund generation.*

**17. Where could we earn additional revenue or fees?**

- *I don't know*
- *Environmental consulting (to municipalities)*
- *Additional fee-for-service initiatives could be introduced as long as they fit within the scope of PRMS staff skill base and as long as they didn't cause current service delivery capabilities to suffer.*
- *Regional Geo Database Center, value added data, A "dispatch" and/or "tracking" centre for Fire Services, Energy and Private Business "for work alone legislative requirements"*
- *I think we need to focus on the current planning needs before the organization moves to additional service delivery. But, some services were noted above, and I like to potential to develop ownership based mapping that includes an assessment link for residents. Manitoba has just done a mapping based system where a landowner can access his assessment information via web using a map based inquiry process. The potential for GIS based functions is limitless.*

**18. As we enter this strategic planning process, please list those areas that are absolutely critical that we focus on. These are the major themes that we must explore in our planning session:**

- *Subdivision service, statutory plans & bylaws, mapping, GIS*
- *Please focus on the core services. They are critical to the long term success of Palliser.*
- *Planning, Safety Codes, networking*
- *Meeting client needs*
  - *Expanding on service delivery only in areas that are clearly indicated as priorities of the membership*
  - *Maintaining focus on existing core service delivery areas – don't drop the ball on current customer base because staff resources are being allocated towards a new initiate or a new client.*
- *Land Use Framework, Red Deer River Basin Plan and how it is going to impact our planning throughout existing PRMS region and at the local level.*
  1. *Financial Planning – we need to ensure that our financial resources can meet current service levels and/or possibly be expanded.*
  2. *Mapping and GIS services need direction*
  3. *Member communication and efforts to hear member concerns must be addressed.*
  4. *Long term staffing and staffing levels need to be established.*

## MUNICIPAL NEEDS ASSESSMENT

1

A core function of Palliser Regional Municipal Services is to provide municipal services to the member municipalities that would be effectively provided on a regional basis.

In many of the member municipalities the CAO is also the development officer, dog catcher, bylaw enforcement officer, payroll clerk, etc. This can become overwhelming as the CAO is a municipal 'jack-of-all-trades', generally without the available time, training or experience to sufficiently achieve the results in all areas to be completely effective.

The types of services to be considered are those that are not currently available locally, or that are not economical or effectively provided due to time and staffing constraints.

PRMS core services are considered to be Municipal/ Community Planning, Specialized Municipal Base Mapping, Subdivision Authority, Planning Advice and Safety Codes Services. The following additional services have been mentioned as being beneficial to the municipal members of PRMS. Any of the services that have a high level of interest will be further reviewed as a business case to determine the necessary levels of service and funding required to be completed successfully.

***Please review the following section in relation to the current needs of your municipality and services that could be effectively delivered on a regional basis:***

	<u>Priority</u>	<u>Potential</u>	<u>No Merit</u>
Regional Lobby Coordination (i.e. liaison w/ gov't agencies)	1	6	
Regional Studies, Reports (i.e. LUF, ALSA, Regional Plan)	3	4	
Regional Bylaw Enforcement	3	3	1
Regional Development Officer	2	3	2
Joint Equipment Purchasing Program	1	1	5
Information Technology (IT) support	2	4	1
Training (SDAB, Governance, etc.)	2	4	
Sustainability Plan Implementation	4	3	

	<u>Priority</u>	<u>Potential</u>	<u>No Merit</u>
GPS/ GIS Infrastructure Data collection, dissemination and maintenance	4	2	1
Municipal Policy research and development (i.e. addressing policy, water conservation, etc.)	3	4	
Municipal grants research/ administration	2	3	2
Land use amendment applications (to be processed similar to subdivision applications)	5	2	
Municipal Property Assessment services	2	5	
CAO Advisory Services (pending retirements of many CAO's)	1	5	

**Appendix 'B'**

**PALLISER REGIONAL  
MUNICIPAL SERVICES**

**STRATEGIC PLAN 2010-2013**

**RESULTS REPORT**

**May 2010**

# **PALLISER REGIONAL MUNICIPAL SERVICES**

## **EXECUTIVE SUMMARY**

### **MISSION (draft)**

*To provide effective and affordable local government services with expertise that support regional cooperation and communication*

### **VISION (draft)**

*A vibrant regional organization that provides relevant, effective and sustainable services and solutions to local governments*

*Planning...Safety Codes...  
Regional Solutions...and more*

### **VALUES AND GUIDING PRINCIPLES (draft)**

#### **Professional**

We are a professional organization that provides prompt, efficient delivery of quality regional services while maintaining honesty and integrity in all of our endeavours.

#### **Supportive**

We support our members by providing innovative and flexible services tailored to meet the needs of individual members.

#### **Sustainable**

Through regional cooperation, collaboration and coordination we will remain a valued organization

## **INTRODUCTION/WORKSHOP OUTCOMES**

A **Strategic Plan 2010-2013 Workshop** was held for **Palliser Regional Municipal Services (PRMS)** on May 19, 2010 at Hanna, Alberta. This workshop was organized by the PRMS and was facilitated by Terry Vaughan of Alberta Culture and Community Spirit. The workshop outcomes as described below and in Appendix #1 – Agenda were substantially achieved:

### **Workshop Outcomes:**

By the end of this strategic planning workshop municipal representatives and PRMS staff will have:

- ❖ Substantially completed development of a strategic plan for the three-year period 2010-2013, including review and, with or without changes, confirmation of the new Vision (desired future) and Mission (organizational purpose) for the PRMS
- ❖ Developed the core Values and Guiding Principles as the fundamental belief statements for the PRMS
- ❖ Identified and Prioritized the Services that are currently being delivered and any New Services that will be delivered by PRMS over the next three years
- ❖ Gained greater awareness and understanding of the services provided by the PRMS

This Results Report is a compilation of the information and input that was received from the 21 PRMS municipal representatives and staff members who participated in the Strategic Plan 2010-2013 Workshop.

## **WHAT IS THE MISSION FOR THE PRMS?**

During this session the municipal representatives and staff members identified the overall purpose of the PRMS by the responding to the following focus questions:

*What is the overall “purpose” of the PRMS?  
What makes the PRMS a “unique” association?*

These workshop participants initially identified characteristics of the mission for the PRMS, followed by the development of draft mission statements, which lead to creation of a proposed new mission for the PRMS. They also kept the existing PRMS Mission in mind as they provided their input on the proposed new statement. The results of this work are indicated as follows:

### **PRMS Current Mission:**

“Our purpose is to foster a cooperative forum and provide services that support municipal members’ community planning and development in East Central Alberta”

### **PRMS Mission Characteristics:**

- To provide expertise and services to communities who cannot access this support in-house
- PRMS provides affordable services and is not for profit
- Permitting and building development services
- Coordination of joint regional services
- All municipalities have an equal opportunity to access PRMS services
- Cooperative forum
- Effective
- Support for local governments
- Regional communication
- Responsive
- Consistency and dependability
- Accessibility

### **Draft PRMS Mission Statements:**

“A sustainable regional organization providing effective responsive municipal services in an affordable effective manner”

“To be accessible to a cooperative region and provide services and expertise in an affordable and effective manner”

“To provide effective, quality and cooperative planning and development services to our member municipalities”

“Provide equal opportunities to member municipalities that makes it affordable for joint regional services”

“Our purpose is to coordinate a sustainable forum for regional services and communication that effectively and innovatively provides affordable services which are consistent and dependable”

“Our purpose is provide a cooperative forum and expertise services permitting and building development supports of local development”

“To provide effective local government services with expertise regionally that support regional cooperation and communication”

“To provide effective and affordable local government services with expertise that support regional cooperation and communication”

## **Proposed New Mission Statement for the PRMS:**

### **PALLISER REGIONAL MUNICIPAL SERVICES**

#### **MISSION (draft)**

*To provide effective and affordable local government services with expertise that support regional cooperation and communication*

## **WHAT IS THE VISION FOR THE PRMS?**

The municipal representatives and staff members were requested to picture the PRMS in 2015 in terms of what its preferred future would look like? They also reviewed for relevancy the existing PRMS Vision and then identified the key characteristics of a potential new vision for the PRMS? The results of this work, including the proposed new vision for the PRMS appear below:

### **PRMS Current Vision:**

“Capitalizing on regional community planning and advisory member services participatory model that supports and strengthens local government at a local decision-making level, centered and focused within the region”

### **PRMS Vision Characteristics:**

- ✓ Regional centered excellence
- ✓ Center for information
- ✓ Comparable services to other Alberta-based regional-based planning organizations
- ✓ Increased visibility and communication services
- ✓ Changeable, adaptable, flexible
- ✓ Vibrant, successful, positive, professional
- ✓ Regional communication
- ✓ Regional governance
- ✓ Environmental awareness initiatives
- ✓ Viability and sustainability of PRMS
- ✓ Enhancement of services
- ✓ Regional solutions
- ✓ Grassroots level

### **Draft PRMS Vision Statements:**

“Provides relevant and effective municipal services that meet and exceed legislated requirements, while focused on the needs of its members”



Accountability (3)

Consistency (3)

Sustainability (3)

Accessibility

Flexibility

Innovation

### **PRMS Draft Values and Guiding Principle Statements:**

Draft # 1:

#### Professionalism

We strive to be a professional organization through the prompt, efficient delivery of quality regional services while maintaining honesty and integrity in all of our endeavours.

#### Supportive

We support our members by providing innovative and flexible services tailored to meet the needs of individual members.

#### Sustainability

Through regional collaboration and coordination we strive to remain a valued organization.

Draft # 2:

#### Professional

We are a professional organization that provides prompt, efficient delivery of quality regional services while maintaining honesty and integrity in all of our endeavours.

#### Supportive

We support our members by providing innovative and flexible services tailored to meet the needs of individual members.

#### Sustainable

Through regional cooperation, collaboration and coordination we will remain a valued organization.

### **Proposed Values and Guiding Principles Statement for the PRMS:**

#### **PALLISER REGIONAL MUNICIPAL SERVICES**

## VALUES AND GUIDING PRINCIPLES (draft)

### Professional

We are a professional organization that provides prompt, efficient delivery of quality regional services while maintaining honesty and integrity in all of our endeavours.

### Supportive

We support our members by providing innovative and flexible services tailored to meet the needs of individual members.

### Sustainable

Through regional cooperation, collaboration and coordination we will remain a valued organization

## ANALYSIS OF PRMS SERVICE ACTIVITIES

While keeping in mind the new draft Mission, Values and Guiding Principles and Vision statements the municipal representatives and PRMS staff discussed and analyzed the current and potential future Services that are and could be provided by the PRMS over the three-year period extending from May 2010 to May 2013. In this regard, while in small groups, they responded to the specific services in each of the 5 PRMS Service Activity clusters through a series of focus questions that can be viewed in Appendix #1 – Agenda.

The response by the groups to the 5 Service Activities, along with their comments about the Management, Organization and Administration of the PRMS are documented on the following several pages

### **Service Activity:**                      **Subdivision Services**

*What have been the positive results of the specific services provided by the PRMS to your municipality for this Service Activity?*

- Prompt
- Dependable
- Affordable

*Where are there changes required or improvements needed in the specific services provided by the PRMS to your municipality for this Service Activity?*

- Increased staffing will improve turn around times
- Technical planning expertise
- Viable Funding

*When you think about all of the services provided by the PRMS, what should be requisition-based service activities and what should be fee-for-service activities?*

- Nothing was reported for this question

*Regarding this Service Activity:*

*What specific services should be continued? Why is it important that these services be maintained?*

- All current services should be maintained, as these are the current services that PRMS was founded on

*What specific services should be deleted? Why are you recommending that these services be discontinued?*

- No services were recommended to be deleted

*What new services would you recommend be added to this Service Activity?*

*What would be the benefit(s) of adding these services?*

- No services were recommended to be added

## **Service Activity:**

## **Municipal Advisory Services**

*What have been the positive results of the specific services provided by the PRMS to your municipality for this Service Activity?*

### Municipal Planning Services

- All of the services in this category are good

### Long Range and Special Planning Advisory Services

- All of the services in this category are good

### General Comments

- PRMS is locally available
- Relevant information
- Expertise, training
- Man hours
- Excellent service/sustainable

*Where are there changes required or improvements needed in the specific services provided by the PRMS to your municipality for this Service Activity?*

### Municipal Planning Services

- There is a need for more training

### Long Range and Special Planning Advisory Services

- There is a need for timely updates
- Economic planning is not required

### General Comments

- While all of the services in this Service Activity were viewed as valuable the concern was expressed as to how the PRMS could afford to provide the staffing required.
- Clarification of “municipal services” to public and safety codes
- General need for training of PRMS staff
- Updating current website
- Subdivision fees does not cover the cost of the service (i.e. requisition based and fee-for-service)
- Land use change applications processed similar to subdivisions (fees established)
- Improve linkage from ACP/ASP to subdivision stage in a timely manner
- Need for common fee schedule for ACP
- Need for municipality training on ACPs requirement

*When you think about all of the services provided by the PRMS, what should be requisition-based service activities and what should be fee-for-service activities?*

- “Training” should be a fee-for-service activity

*Regarding this Service Activity:*

*What specific services should be continued? Why is it important that these services be maintained?*

- No comments were received for this question

*What specific services should be deleted? Why are you recommending that these services be discontinued?*

- No services were recommended to be deleted

*What new services would you recommend be added to this Service Activity?*

*What would be the benefit(s) of adding these services?*

- Landscape development/plans
- Website management and development
- Training PRMS staff

**Service Activity:**

**Mapping and Data Base Services**

What have been the positive results of the specific services provided by the PRMS to your municipality for this Service Activity?

- One platform (GIS)
- Expertise in-house
- Mapping visual representation of planning
- Printing service
- Printing (one) – inter-municipal maps
- Manipulating of data in-house (custom mapping)

Where are there changes required or improvements needed in the specific services provided by the PRMS to your municipality for this Service Activity?

- Linking all GIS Staff – Regional Forum
- GIS – What is core? – land use mapping? support for smaller municipalities?
- GIS/mapping – need for quality and consistency
- Need to be more proactive instead of reactive
- Need for increased identification of future needs
- Need for more expertise in-house
- Need to re-evaluate fees for mapping
- Need to update LUB maps in a more efficient and timely manner
- PRISM should be integrated into infrastructure mapping
- More usage by members based on training and have an open source and be user friendly
- Google Earth/NAV/TEQ
- Need for a regional routing system – rural addressing coordination
- Need for Local Dispatchment Fire – after hours call center
- Need for consistent fees
- Be ready to promote/target areas – need to find someone to help with this work
- Website support is necessary both from a maintenance standpoint and via giving it a new look and feel

When you think about all of the services provided by the PRMS, what should be requisition-based service activities and what should be fee-for-service activities?

#### Strategic Issues

- What do we charge for? - private versus municipal? fee or requisition?

#### Fee-for-Service

- Mapping for brochures

#### Requisition Services

- GIS advice
- Subdivision design
- Municipality Base Map
- Land Use Bylaw (LUB)
- Data Base
- Infra Mapping

\*It was noted that there is a need to look at member and non member rates for service

*Regarding this Service Activity:*

*What specific services should be continued? Why is it important that these services be maintained?*

- Continue all services, however need to determine what are or are not core services and which should be requisition or fee-for-service based services

*What specific services should be deleted? Why are you recommending that these services be discontinued?*

- No services were recommended to be deleted

*What new services would you recommend be added to this Service Activity?*

*What would be the benefit(s) of adding these services?*

- Infrastructure mapping – PRISM core
- Develop an ownership map with link for assessment

**Service Activity:**

**Administration of Safety Codes**

*What have been the positive results of the specific services provided by the PRMS to your municipality for this Service Activity?*

- Generally like how the Safety Codes are being handled
- Excellent service

*Where are there changes required or improvements needed in the specific services provided by the PRMS to your municipality for this Service Activity?*

- Notification to the municipality when a permit has been issued (i.e. individually or monthly or quarterly report)
- Provide member training on permits
- Use consistent forms with the PRMS logo
- Provide training on web access of permit status
- Have online PDFs that can be completed
- Need for a clarification of guidelines/farm (agriculture) structure
- Need for training of PRMS staff on municipal requirements

**Service Activity:**

**Other Projects**

What have been the positive results of the specific services provided by the PRMS to your municipality for this Service Activity?

- Newsletter communication
- FATF funding to Sustainability Plan creation
- Leadership/oversee start of CN group
- One more senior planner recruited – good job!
- We can utilize grant programs to fund our services
- We have been able to use PRMS staff to qualify for funding (i.e. sustainability plans)
- PRISM was good to get the concept out, however follow-up was lacking

Where are there changes required or improvements needed in the specific services provided by the PRMS to your municipality for this Service Activity?

- What is the Regional/Partnership Opportunities Review project all about?
- PRISM was good to get the concept out, however follow-up was lacking

When you think about all of the services provided by the PRMS, what should be requisition-based service activities and what should be fee-for-service activities?

#### Requisition Projects

1. Regional partnership opportunities review
2. Production of a regional profile
5. Coordination of a Regional Development Officer's Association
8. Ongoing production of a regional development based newsletter

#### Fee for Service Projects

3. CN Rail Discontinuance
4. Consideration of a GIS/IT Field Officer Program
6. Sustainability Plan preparation
7. Palliser Regional Information Systems Management (PRISM) Enhancement Project

Regarding this Service Activity:

What specific services should be continued? Why is it important that these services be maintained?

- Regional newsletter – it is a good communication tool
- CN Rail – passionate people/economic development opportunities
- PRISM – good municipal tool

\* A comment was made that it is important for PRMS to deliver core services first and then use remaining resources for extra services etc.

What specific services should be deleted? Why are you recommending that these services be discontinued?

- No services were recommended to be deleted

What new services would you recommend be added to this Service Activity?

What would be the benefit(s) of adding these services?

- Training for new councilors was recommended as a new project. Training topics to include subdivision appeal board, governance, coordination of ARB training for local administrators etc.
- JARB training locally
- GIS/IT Field Assistant
- Sustainability Implementation
- Grant Research Coordinator

## **MANAGEMENT, ORGANIZATION AND ADMINISTRATION OF THE PRMS**

*What comments, suggestions, or recommendations does your small group have regarding any of the following management, organization and administration of the PRMS topics?*

- Organization structure

### One Group's Depiction of the PRMS Organization Structure

Municipal Members

Board of Directors

CEO/Senior Planner ----- Executive Assistant

Planner ---- Planning Assistant ---- GIS ---- Sustainable

- Staffing/Funding
  - Funding availability restricts
  - Variable workloads
  - Staffing is affected by what the “core services” are
  - New projects requires more staffing and this requires more funding
- Funding
- Other topics??
  - PRMS has to move ahead with new innovation and delivery methods and then bring the members along for the ride

## **REVIEW OF PRMS PRIORITY SERVICES**

During this session the municipal representatives and PRMS staff, using sticky dots, voted for the PRMS services that they identified as being significant priorities. They then provided their comments regarding all of the specific services that are currently being delivered or may be delivered in the future by the PRMS. The results of the voting and the comments that they provided can be seen as follows:

### **Priority Services:**

(note the number beside each specific service signifies how many votes it received)

### **SERVICE ACTIVITY: SUBDIVISION SERVICES**

#### **Specific Services:**

- Act as subdivision authority on behalf of the municipality (1)
- Process subdivision applications pursuant to legislation (12)
- Advise Municipality: provide subdivision reports and recommendations (10)
- Inform applicant and agencies of decision
- Represent municipality at appeal hearings (1)
- Endorse registerable documents
- Process LUB re-designations (3)
- Coordinate services of a Regional Appeal Board
- ACP Development (1)

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### **SERVICE ACTIVITY: MUNICIPAL ADVISORY SERVICES**

#### **Specific Services:**

#### **Municipal Planning Services**

- Day to day advice to Municipal Officials (1)
- Advice to General Public
- Consultation with Provincial Departments
- Development permitting assistance/advice
- Preparation of offsite levy bylaws

#### **Long Range and Special Planning Advisory Services**

- Municipal Plans and Bylaws (10)
- Inter-municipal plans and studies (3)
- Municipal Research and Policy Development

- Associated Public Participation
- Design Planning (2)
- Economic Planning
- Training (2)
- Other

Proposed new services:

- Website management and development (4)
- CAO Advisory Group (2)
- Landscape Design/Plans (1)
- Training for PRMS staff

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**SERVICE ACTIVITY: MAPPING AND DATA BASE SERVICES**

**Specific Services:**

**Technical Assistance Services**

- Mapping for plans, reports, tourism brochures, etc.
- GIS Development and Advice (2)
- Subdivision Design
- Municipal Base Map Maintenance
- Land Use Bylaw Map Maintenance, registered plans, index map preparation and special maps (11)
- Data Base (land use, demographic, etc.) maintenance and update (1)

Proposed New Services:

- Infrastructure mapping – PRISM core (5)
- Ownership based mapping with link to assessment

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**SERVICE ACTIVITY: ADMINISTRATION OF SAFETY CODES**

PRMS is accredited in building, electrical, gas and plumbing disciplines under an agency QMP. Inspections contracted to Superior Safety Codes

- Note that because the Administration of Safety Codes are viewed by the municipal representatives and PRMS staff as an essential service for the PRMS, therefore they were not requested to vote for this Service Activity.

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**SERVICE ACTIVITY: OTHER PROJECTS**

**Specific Services:**

1. Regional Partnership Opportunities Review
2. Production of a Regional Profile
3. CN Rail Discontinuance Recovery Project (1)
4. Consideration of a GIS/IT Field Officer Program (3)
5. Coordination of a Regional Development Officer’s Association
6. Sustainability Plan Preparation
7. Palliser Regional Information Systems Management (PRISM) Enhancement Project (1)
8. Ongoing Production of a Regional, Development Based Newsletter

Proposed New Projects

9. Councilor training (2)
10. JARB Training locally (1)
11. Grant research coordinator/writer
12. Sustainability implementation
13. GIS/IT Field Assistant

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**PRMS SERVICE ACTIVITIES – GENERAL COMMENTS**

- It was nice to be reminded today about the volume and scope of the services that are delivered by the PRMS.
- I was surprised by the number of votes that Land Use Bylaws received. It was noted that the PRMS mapping service is a large need/priority for municipalities as they are particularly valuable when presentations are made etc.

- A comment was made that it is important for PRMS to continue to deliver the specific services within all of the 5 Service Activities, as well as to keep in mind the strategic issues that were identified at this workshop.
- It was expressed that the legislated requirements, whether they are big or small, must be carried out.
- A question was asked as to whether economic planning that is done by the PRMS is a resource for municipalities, or simply a duplication of what is provided by local governments and/or community organizations?
- It was emphasized that there still is a need for the PRMS to reconcile what are requisition based services and what are fee-for-service based services.
- A question was asked as to why PRMS is providing some services to non members? The response was that this does bring in additional revenue. Also, it was reported that the only non member who has really used PRMS services has been the M.D. of Provost who have received subdivision development support on a fee-for-service basis.
- A suggestion was made that PRMS in regards to their service provision, including GIS and technical services, review each member municipality on a five year rotational basis
- A question was asked as to whether there will be change in the current PRMS requisition fee formula? The response was that this will likely happen in the near future. As the level of services that are delivered by PRMS increase there is a subsequent need for the funding support to also increase.

## **ACTION PLANNING THE PRMS SERVICE ACTIVITIES**

The municipal representatives and PRMS staff briefly reviewed a sample template for development of the *Action Plans* (see Appendix #2 – Action Plan) for each of the specific services within each of the 5 Service Activities for the PRMS. When reviewing this template they considered questions such as:

*What strategies will successfully achieve the specific service for this Service Activity? Who will do the work? When will the work be done? What resources will be required? How will success be measured?*

It was noted that the actual Action Plans for each of the specific services for each Service Activity will be developed following the workshop by PRMS staff.

## **NEXT STEPS TO COMPLETE THE STRATEGIC PLAN FOR THE PRMS**

At the end of the strategic planning retreat it was agreed by the municipal representatives and PRMS staff members that the following were necessary next steps to complete the Strategic Plan 2010–2013 for the PRMS.

- Terry Vaughan to develop and deliver to Brad Wiebe a Results Report that captures the information and input that was received from the 21 workshop participants
- Brad Wiebe will review this Results Report for accuracy and, with or without changes, will circulate it to all of the workshop participants, as well as to PRMS board and staff members and to others as deemed necessary
- The PRMS Board at a regular meeting will approve, with or without changes, the proposed Mission, Vision, Values and Guiding Principles as the fundamental statements that will guide the work of the PRMS over the three-year period 2010-2013
- The PRMS Board at a regular meeting will approve, with or without changes, the 5 PRMS Service Activities and their respective Specific Services as the services that will be delivered by the PRMS for the three-year period 2010-2013
- The PRMS Staff will develop and implement the Action Plans for each of the Specific Services for the 5 PRMS Service Activities over the three-year period 2010–2013
- The PRMS Board and Staff on an annual basis from 2010-2013 will monitor and review progress, as to completion of the respective Action Plans
- Early in 2013 the PRMS Board and Staff will meet to develop a new three-year Strategic Plan for the PRMS

# **APPENDIX #1**

## **AGENDA**

**PALLISER REGIONAL MUNICIPAL SERVICES (PRMS)**  
**STRATEGIC PLAN 2010-2013 – WORKSHOP**

**9:00 a.m. – 4:00 p.m.**

**Wednesday, May 19, 2010**

**Meeting Room, PRMS Office, Hanna, Alberta**

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**Workshop Outcomes:**

By the end of this strategic planning workshop municipal representatives of Palliser Regional Municipal Services (PRMS) will have:

- ❖ Substantially completed development of a strategic plan for the three-year period 2010-2013, including review and, with or without changes, confirmation of the new Vision (desired future) and Mission (organizational purpose) for the PRMS
- ❖ Developed the core Values and Guiding Principles as the fundamental belief statements for the PRMS
- ❖ Identified and Prioritized the Services that are currently being delivered and any new services that will be delivered by PRMS the over the next three years
- ❖ Gained greater awareness and understanding of the services provided by the PRMS

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**AGENDA**

**9:00 a.m. OPENING COMMENTS/INTRODUCTIONS**

Brad Wiebe – Chief Executive Officer/Senior Planner

**WORKSHOP OUTCOMES/AGENDA REVIEW**

Terry Vaughan – Facilitator, Alberta Culture and Community Spirit

**9:15 a.m. WHAT IS THE MISSION FOR THE PRMS?**

The municipal representatives will identify the key characteristics and elements of the Mission for the PRMS, while keeping in mind the following focus questions:

*What is the overall “purpose” of the PRMS?*

*What makes the PRMS a “unique” association?*

Then, with or without changes to their current Mission statement, they will confirm the new Mission for the PRMS that will best define its purpose as an organization.

**9:45 a.m. WHAT IS THE VISION FOR THE PRMS?**

While keeping in mind what its preferred future will look like in 2015 the municipal representatives will review the current Vision statement for the PRMS. Then, with or without changes, they will confirm the new Vision statement for the PRMS.

**10:15 a.m. BREAK**

**10:30 a.m. WHAT ARE THE CORE VALUES AND GUIDING PRINCIPLES FOR THE PRMS?**

The municipal representatives will determine the core Values and Guiding Principles that will guide the daily operations and decision-making of the PRMS?

**11:15 a.m. WRITING THE VISION, VALUES AND GUIDING PRINCIPLES AND MISSION STATEMENTS FOR THE PRMS**

Keeping in mind the discussions during the previous three workshop sessions the municipal representatives, while working in small groups, will develop a draft of the new or modified Vision, Values and Guiding Principles and Mission statements for the PRMS. When approved by the PRMS Board these new statements will serve as the fundamental belief statements for the association.

**11:45 a.m. PRESENTATION OF NEW DRAFT MISSION, VALUES AND GUIDING PRINCIPLES AND VISION STATEMENTS FOR PRMS**

**12:00 p.m. LUNCH BREAK**

**12:30 p.m. ANALYSIS AND PRIORITIZATION OF PRMS SERVICES**

While keeping in mind the new draft Mission, Values and Guiding Principles and Vision statements the municipal representatives will discuss, analyze and then prioritize the current and potential future Services that are and could be provided by the PRMS over the three-year period extending from May 2010 to May 2013. In this regard, while in small groups, they will respond to the specific services in

each PRMS Service Activity cluster by utilizing the focus questions on the attached page.

**2:30 p.m. BREAK**

**2:45 p.m. REVIEW OF PRMS PRIORITY SERVICES**

The municipal representatives, as a whole group, will review for appropriateness the identified Priority Services for the PRMS.

**3:30 p.m. ACTION PLANNING THE PRMS PRIORITY SERVICES**

The municipal representatives will briefly review a sample template for development of the *Action Plans* for each of the Priority Services for the PRMS. When reviewing this template they will consider questions such as:

*What strategies will successfully achieve the Priority Service? Who will do the work? When will the work be done? What resources will be required? How will success be measured?*

It should be noted that the actual Action Plans for each of the Priority Services will be developed following the workshop by PRMS staff.

**3:45 p.m. NEXT STEPS**

What still remains to be done to complete the development of the strategic plan for PRMS for the three-year period extending from 2010 to 2013?

**WORKSHOP EVALUATION**

**4:00 p.m. WORKSHOP CLOSURE**

*This workshop is sponsored by  
**PALLISER REGIONAL MUNICIPAL SERVICES**  
and is facilitated by  
**ALBERTA CULTURE AND COMMUNITY SPIRIT***

## **ANALYSIS AND PRIORITIZATION OF PRMS CURRENT AND POTENTIAL FUTURE SERVICES**

**For each Service Activity, please have your small group respond to the following focus questions:**

*What have been the positive results of the specific services provided by the PRMS to your municipality for this Service Activity?*

*Where are there changes required or improvements needed in the specific services provided by the PRMS to your municipality for this Service Activity?*

*When you think about all of the services provided by the PRMS, what should be requisition-based service activities and what should be fee-for-service activities?*

*Regarding this Service Activity:*

*What specific services should be continued? Why is it important that these services be maintained?*

*What specific services should be deleted? Why are you recommending that these services be discontinued?*

*What new services would you recommend be added to this Service Activity?  
What would be the benefit(s) of adding these services?*

## **MANAGEMENT, ORGANIZATION AND ADMINISTRATION OF THE PRMS**

*What comments, suggestions, or recommendations does your small group have regarding any of the following management, organization and administration of the PRMS topics?*

- Organization structure
- Staffing
- Funding
- Other topics??

## **APPENDIX #2**

# **ACTION PLAN TEMPLATE**

## Palliser Regional Municipal Services - Action Plan

**Service Activity:**

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**Specific Service:**

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**Solution:**

**(One solution per sheet)**

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**Who will do the work?**

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**When will the work be done?**

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**What resources will be required?**

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**How will you measure success?**

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