

The Corporation of the Town of Niagara-on-the-Lake

Information Report to Council

SUBJECT: Second Quarter & Final Strategic Plan Update for 2026
DATE: 2026-07-14
REPORT #: OPST-26-007
PREPARED BY: Lucie Palka
DEPARTMENT: Organizational Performance, Strategy & Transformation

INTRODUCTION

Since its adoption, the Strategic Plan has served as the Town's roadmap, aligning Staff's work across every department with Council's vision for the community. It has guided priorities, decisions, and reporting throughout the term and helped translate that vision into tangible progress. Less than a year remains in the Plan, and Staff are focused on the main priorities and continued progress across the organization.

This report covers both what the Plan has achieved so far and the work still underway. Staff will continue this work through the remainder of the Plan, with any unfinished items captured in the Strategic Plan Renewal and Readiness Brief for the next term of Council's consideration. The brief is intended to support a smooth transition and help the incoming Council build on the foundation established over the past four years.

EXECUTIVE SUMMARY

- This is the final update on Council's 2022–2027 Strategic Plan, with progress reported through the second quarter of 2026.
- 80.3% of all Indicators of Success are Complete or On Target as of the second quarter of 2026.
- 73.2% of all Indicators of Success are now fully Complete.
- Progress is seen across all four pillars.
- Collectively, these achievements have resulted in improved long-term planning, stronger financial sustainability, enhanced customer service, expanded heritage protection, modernized municipal services, and significant progress on major community planning initiatives.
- The remaining initiatives are primarily longer-term projects that will continue in partnership with external organizations or extend into the next Council term.
- To support the transition to the next term of Council, Staff are preparing a Strategic Plan Renewal and Readiness Brief for the next term of Council.

BACKGROUND INFORMATION

On July 25, 2023, Town Council approved its five-year Strategic Plan (2022–2027). The Plan has four pillars:

- Vibrant & Complete Community
- Good Governance
- Enrich Community Assets, Environment, & Infrastructure
- Optimize Organizational Excellence

The Strategic Plan is structured around 12 Priorities, 58 Action Items, and 127 Indicators of Success. As they carry out the action items identified within the Plan, Staff use two lenses of Diversity, Equity and Inclusion and Environmental Stewardship, which help make sure projects and initiatives are inclusive and sustainable. Beyond these two formal lenses, Staff also apply a communications lens throughout delivery, to help ensure that progress and updates are shared clearly and consistently with Council and the community.

In practice, the Diversity, Equity and Inclusion lens was applied to community engagement efforts designed to reach diverse audiences, inclusive customer service, and DEI considerations incorporated into projects. Environmental Stewardship has similarly been applied across a range of projects, from completed initiatives such as the Invasive Species Management Plan and the review of the Engineering Standards Update, to ongoing work including tree planting, natural asset inventory, the Four Mile Creek Integrated Watershed Management Plan, and the Urban Forestry Management Plan.

This final report shows progress through the second quarter of 2026, the point by which the original Plan anticipated all Action Items and Indicators of Success would be concluded. The Strategic Plan remains in effect through 2027 until the next term of Council adopts a new Plan, and Staff will continue to advance any remaining items during that time.

ANALYSIS

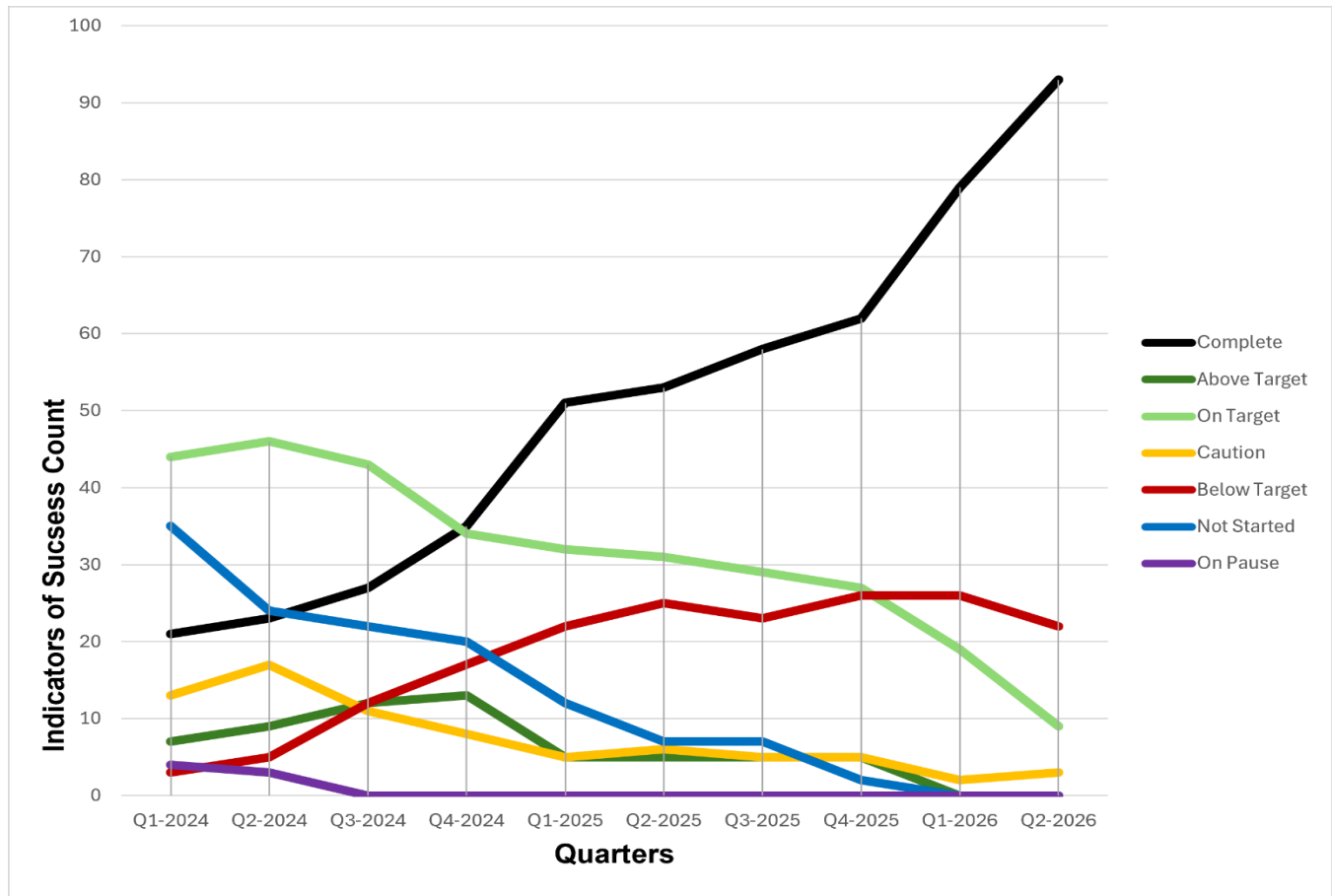
High-Level Overview of Progress Over Time

Figure 1 shows the number of Indicators of Success in each status over ten quarters, from the first quarter of 2024 through the second quarter of 2026. It provides a broad view of how the Plan has progressed over time.

Status Definitions

- **Complete:** The item has been fully achieved.
- **Above Target:** Progress is ahead of schedule, or performance is exceeding expectations before the target date.
- **On Target:** Progress is on schedule and is expected to meet the target date as planned.
- **Caution:** There are signs that the target date may be at risk, with close monitoring recommended.
- **Below Target:** The item is behind schedule or underperforming and is unlikely to meet the target date without intervention.
- **Not Started:** Work has not yet begun.
- **On Pause:** Work has been temporarily halted.

Figure 1: Strategic Plan Indicator of Success Status Over Time



Key Observations

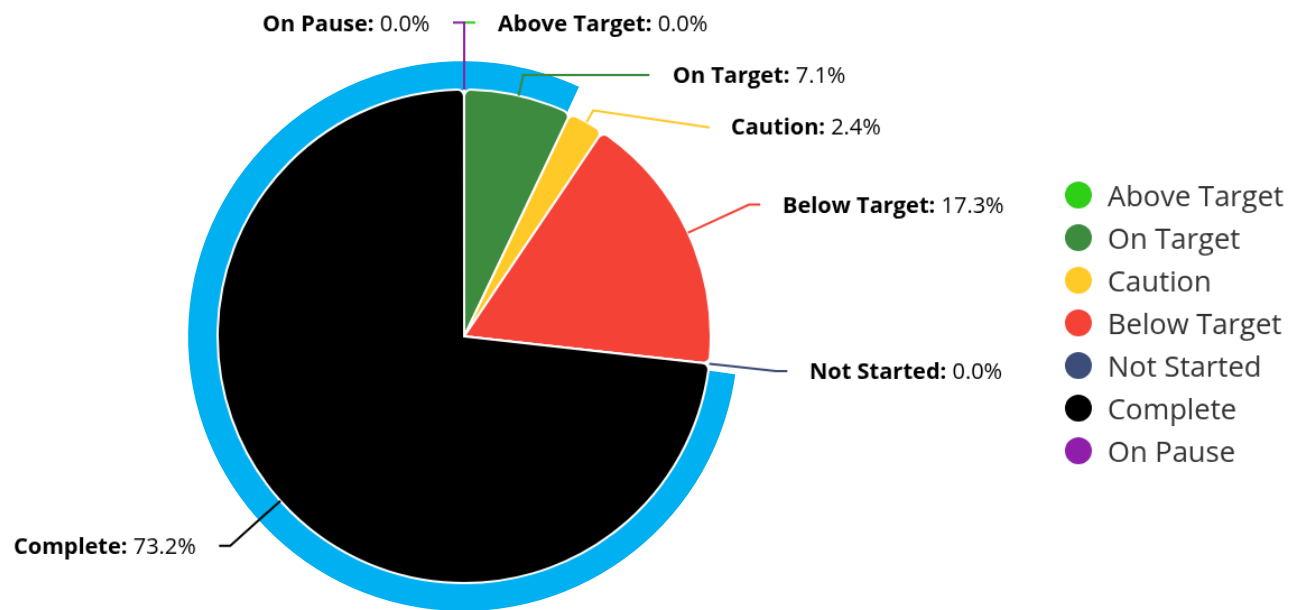
- The number of Completed Indicators of Success has grown steadily since the mid-term update, from 62 (48.8%) to 93 (73.2%). This shows continued delivery and closure of strategic initiatives.
- Nine indicators (7.1%) are On Target, actively progressing toward completion.
- 22 indicators (17.3%) are Below Target. Some of these items relate to matters requiring approvals, long-term infrastructure planning, multi-year initiatives, external partners or other project dependencies. Others reflect the ambitious scope of the original Plan, which set out more than could be fully delivered within a single Council term.
- Three indicators (2.4%) are rated as Caution and are actively being worked on, with completion expected in the third quarter of 2026.

Together, these trends reflect four years of implementation under an ambitious Strategic Plan. This progress continued through a period of significant organizational change, under Council's direction and Staff's continued work across every department.

Tracking and reporting on this work over four years has also surfaced valuable lessons, including the importance of consistent reporting and the value of sustained cross-departmental coordination, both of which will directly inform the Strategic Plan Renewal and Readiness Framework guiding the next term of Council. This marks Staff's final report to this term of Council. The Plan itself remains in effect into the next term.

SECOND QUARTER 2026 - STRATEGIC PLAN SNAPSHOT

Figure 2: Snapshot of Strategic Plan Progress as of June 2026



As of the second quarter of 2026, 80.3% of all Indicators of Success are Complete or On Target. This milestone reflects an increase from 74% at year-end 2025 (CAO-26-007). In the first half of 2026 alone, 30 more Indicators of Success reached Complete status. This growth reflects steady work and coordination across departments, in particular:

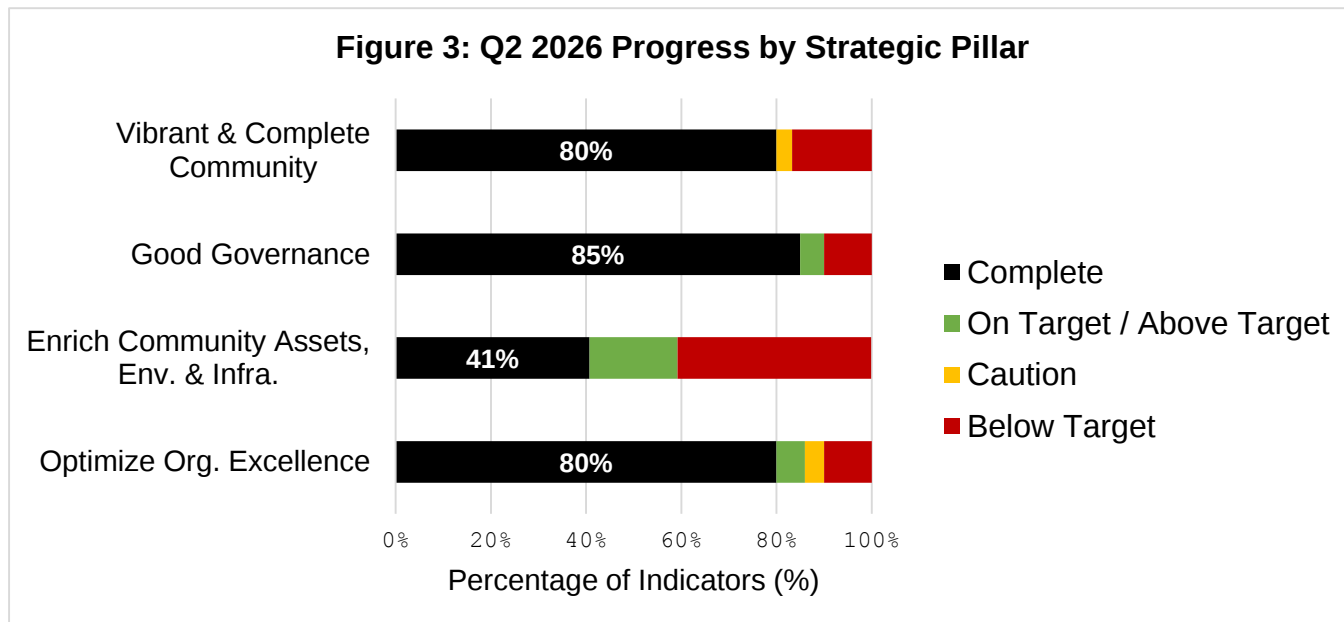
- By the second quarter of 2026, 93 Indicators of Success were marked Complete. That is 73.2% of all initiatives, up from 63 (49.6%) at year-end 2025.
- Nine items, or 7.1%, are On Target. Staff are making steady progress as the Plan nears its end.

This combined 80.3% reflects delivery of the Plan's commitments over four years. Behind these numbers are outcomes for residents, including a new Official Plan, expanded heritage protection, modernized services, and stronger long-term financial planning.

For a full breakdown of all Indicators of Success, please refer to **Appendix I: Strategic Plan Final Status Report**.

SECOND QUARTER 2026 - PROGRESS BY PILLAR

Figure 3 shows how the Indicator of Success statuses are spread across the four Strategic Plan pillars.



The overall snapshot shows strong delivery across most of the Plan. Figure 3 shows how that progress is spread across the four pillars.

- **Vibrant & Complete Community** stands at 80% Complete or On Target. Its main planning milestones are the Official Plan, the Heritage Conservation District Expansion, and the Glendale Secondary Plan, now in force and effect.
- **Good Governance** has the highest share of finished work. 90% of its Indicators are Complete or On Target (85% fully Complete). This includes the 10-Year Capital Budget Plan, fee reviews, and the Sponsorship and Naming Rights Policy, all finished over the life of the Plan.
- **Enrich Community Assets, Environment, & Infrastructure** is at 59% Complete or On Target, the lowest of the four pillars. This reflects the nature of its remaining initiatives, including the Enhanced Asset Management Plan, the Natural Assets Plan, the Climate Change Adaptation Plan, and the Coastal Protection Program, many of which involve long-term infrastructure planning, multi-year environmental work, or other dependencies, while some have simply taken longer than planned to advance.
- **Optimize Organizational Excellence** is at 86% Complete or On Target (80% fully Complete). Work has continued across service modernization, digital transformation, fleet, workforce, and customer experience.

Figure 3 shows that progress is strong in three of the four pillars, with Enrich Community Assets, Environment, & Infrastructure trailing at 59%, given its concentration of long-horizon infrastructure and environmental work. Most remaining initiatives across the Plan represent longer-horizon work, external dependencies, or multi-year scopes that extend beyond the current Council term. A smaller number have experienced timing adjustments or just require additional time to complete.

SECOND QUARTER 2026 - PILLAR-BY-PILLAR HIGHLIGHTS

1. Vibrant & Complete Community

- **Official Plan Adopted:** On May 26, 2026, Council adopted the Town's new Official Plan. This followed years of community engagement, public consultation, and review. The Plan has been sent to the Province for approval. It is one of the main planning milestones of this Council term.
- **Heritage Conservation District Expansion:** Council adopted the expansion in March 2026. It placed 533 properties under Part V designation and strengthened heritage protection across the community
- **Glendale Secondary Plan:** The Glendale Secondary Plan was adopted by Council and subsequently appealed to the Ontario Land Tribunal. A verbal decision has now been received from the Tribunal, and the Plan is in force and effect.
- **Planning Priorities for 2026:** In May 2026, Council reviewed the Planning Division's work program (**CDS-26-041**). The Division is managing 34 active projects, of which 16 are tied to the Strategic Plan. Council was asked to endorse eight priority projects for 2026, all mapped to Priority 1.1, Planning for Progress.
- **Parks & Recreation Master Plan:** Approved in principle in the fourth quarter of 2025. Work is now underway to set short- and long-term priorities. The final document is expected by the end of the second quarter of 2026.
- **Youth & Family Programming Growth:** Since 2022, aquatics participation has grown by 25% and day camp participation by 17.8%. New program formats and more community partnerships are in place.

For a full breakdown of all Action Items and Indicators of Success for this pillar, including detailed statuses, please refer to **Appendix I: Strategic Plan Final Status Report**.

2. Good Governance

- **10-Year Capital Budget Plan Approved:** A 10-year Capital Budget Plan has been approved, with a funding strategy to be further supported through the Asset Management Plan.
- **Advertising, Sponsorship and Naming Rights Policy Adopted:** Council adopted this policy on March 24, 2026, which sets a clear framework for revenue and corporate partnerships.
- **Fee Reviews Complete:** Council approved both the Planning Application and Building Application fee reviews on October 28, 2025. The fees now match cost recovery and service demands.
- **Grant Application Success Rate:** Staff have taken a more active approach to finding and pursuing funding, with year-over-year improvement. In 2025, seven of 21 applications were successful, securing \$188,833. As of the second quarter of 2026, three of five applications have been approved, representing a 60% success rate, with \$310,000 awarded.

For a full breakdown of all Action Items and Indicators of Success for this pillar, including detailed statuses, please refer to **Appendix I: Strategic Plan Final Status Report**.

3. Enrich Community Assets, Environment, & Infrastructure

- **Former Hospital Site (176 Wellington Street):** Council endorsed a community-focused direction for the site and approved a two-stage procurement framework.
- **Asset Management Plan:** Phase 1 is complete and approved, and Phase 2 is underway. An Asset Management Coordinator was hired, and the software is in use. An Enhanced Asset Management Plan is expected to go to Council by the end of 2026.
- **Master Services Plan.** The Water Master Servicing Plan and the Pollution Prevention Control Plan are both underway. Staff received the Water Master Servicing Plan report in April 2026, a big step on this infrastructure work. Work on the Pollution Prevention Control Plan is moving ahead at the same time.
- **Climate Change Adaptation Plan:** As of the second quarter of 2026, 11 of 27 initiatives are complete and ongoing, and 15 are in progress. Most of the remaining actions are expected to be complete by the end of 2026.
- **Invasive Species Plan Approved:** Council approved the Invasive Species Plan in April 2026. Key Performance Indicators are built into the Plan, and work has begun.
- **Waterfront (Dock Area) Master Plan:** The community engagement and data analysis phases are complete, and the draft report is in progress. Staff expect to present the final plan to Council in the third quarter of 2026.

For a full breakdown of all Action Items and Indicators of Success for this pillar, including detailed statuses, please refer to **Appendix I: Strategic Plan Final Status Report**.

4. Optimize Organizational Excellence

- **Customer Relationship Management / Salesforce Implementation:** The Town's new cloud-based Customer Relationship Management (CRM) system is on track, with a hard launch planned for the third quarter of 2026. It changes how the Town tracks, manages, and responds to service requests.
- **Customer Experience Plan:** A consultant has been retained, and work is underway. It is expected to be completed early in the third quarter of 2026. The Town's first Customer Experience Plan will set service standards and customer experience commitments across the organization.
- **Community Engagement:** A Community Engagement Plan is being developed, led by a consultant. Engagement has continued to grow year over year, both in person and online.
- **People Strategy:** A consultant has been retained, and the project is underway, with completion targeted for the third quarter of 2026. The Strategy will cover recruitment, retention, succession planning, and leadership development.
- **Customer Experience Training:** All-Staff Customer Experience training took place in the second quarter of 2026.

For a full breakdown of all Action Items and Indicators of Success for this pillar, including detailed statuses, please refer to **Appendix I: Strategic Plan Final Status Report**.

CONCLUSION

This term has been defined not only by what the Strategic Plan achieved, but by how that progress was tracked and shared. From adoption through this final update, Staff maintained a consistent approach to reporting: a regular cadence of updates to Council, supported by a Strategic Plan Dashboard that gave Council and the community ongoing visibility into all 127 Indicators of Success.

This rhythm of reporting, sustained across four years, created a clear and accountable record of how the Plan advanced at every stage under Council's direction. The 2022–2027 Strategic Plan was ambitious in both scope and pace, spanning 12 Priorities, 58 Action Items, and 127 Indicators of Success. Council's priorities were advanced through the work of Staff, who delivered on the large majority of it while carrying out day-to-day operations and navigating a period of significant organizational change.

This combination of delivery and reporting reflects both Council's direction and Staff's implementation of it, leaving the next term of Council with a foundation on which to build its own Strategic Plan. The following section outlines the work already underway to prepare for that transition.

LESSONS LEARNED

Four years of delivering and reporting on the Strategic Plan surfaced several opportunities to strengthen the next Strategic Plan cycle. Key improvements identified include:

- Fewer, more meaningful Indicators of Success, to sharpen focus and reduce reporting complexity
- Increased focus on measuring outcomes rather than outputs, to better capture the real impact of the Plan's work
- The importance of keeping Council informed throughout implementation, to support timely decision-making and sustained alignment with Council's priorities

NEXT STEPS

As this Council term ends, Staff are advancing the Strategic Plan Renewal and Readiness Plan. This preparatory work includes:

- Reviewing the current Strategic Plan's strengths and areas to improve
- Capturing lessons learned from how the Plan was carried out and reported
- Combining input from Staff and Council surveys sent earlier in 2026
- Developing a Strategic Plan Readiness Brief to guide the next Council's planning
- Finding ways to better align the Strategic Plan, department work plans, and the Corporate Performance Reporting Framework

A Strategic Plan Readiness Framework was included as Appendix II to the End-of-2025 Council Report (**CAO-26-007**) and guides this work, with a report coming to Council in September. The Strategic Plan Dashboard is updated with the latest information.

PREVIOUS REPORTS

- **CAO-23-041** – 2022–2026 Council Strategic Plan Update
- **CAO-23-053** – 2022–2026 Council Strategic Plan Update
- **CAO-23-065** – 2022–2026 Council Strategic Plan
- **CAO-23-080** – Strategic Plan Implementation Plan and Indicators of Success
- **CAO-24-017** – Strategic Plan Implementation Q2-2024 Report
- **CAO-24-029** – Strategic Plan Implementation Dashboard
- **CAO-24-054** – Strategic Plan Implementation Mid-Term Update
- **CAO-25-038** – Strategic Plan Update – Second Quarter 2025
- **CAO-26-007** – End of 2025 Strategic Plan Update

ATTACHMENTS

- Appendix I – Strategic Plan Final Status Report