



Imagine Montrose Creating the Future

Integrated Community Sustainability Plan



Guided by:



Funded by:



May 2015

This Document was endorsed by Council for the Village of Montrose on May 4, 2015 and is now incorporated as an additional tool in the Village's decision-making process

Table of Contents

Acknowledgements4

Introduction1

Community History and Profile3

Where we’re going & how we’re moving forward5

 Our sustainability objectives (where we’re going)5

 Our community goals and strategic directions6

What’s Next? A Guide for Implementation14

Appendices

 Appendix A: A tool for decision-making18

 Appendix B: Indicators for ‘where we’re going’24

 Appendix C: Where we are now27

 Appendix D: Action ideas for moving forward29

Acknowledgements

This Integrated Community Sustainability Plan (ICSP) was developed by our community, with guidance from the Whistler Centre for Sustainability. We would like to acknowledge and thank all community members who participated in the process through surveys, public events and on the Advisory Committee. Their contributions provided invaluable information and insights throughout the process.

THE PROJECT ADVISORY COMMITTEE

The Advisory Committee (AC) worked closely with the Whistler Centre for Sustainability team and its members represented the community's interests in the project. Thanks to the team members for all their hard work, time and commitment to the future of Montrose.

Art Benzer, community association

Carmen Gattafoni, member at large

Darren Bourdon, business owner

Jayne Fowler, community association

Jeff Ginalias, RDKB

Joan Cooke, member at large

Joe Danchuk, Mayor, Village of Montrose

Kathryn McFarlane, member at large

Kelvin Saldern, Columbia Basin Trust

Kevin Chartres, Former CAO, Village of Montrose

Lisa Cabana, SD20 parent representative

Mario Como, member at large

Terry Van Horn, Lower Columbia Initiatives Corporation



© 2015, The Corporation of the Village of Montrose. All Rights Reserved. The preparation of this plan was carried out with assistance from the Green Municipal Fund, a Fund financed by the Government of Canada and administered by the Federation of Canadian Municipalities. Notwithstanding this support, the views expressed are the personal views of the author, and the Federation of Canadian Municipalities and the Government of Canada accept no responsibility for them.

Introduction

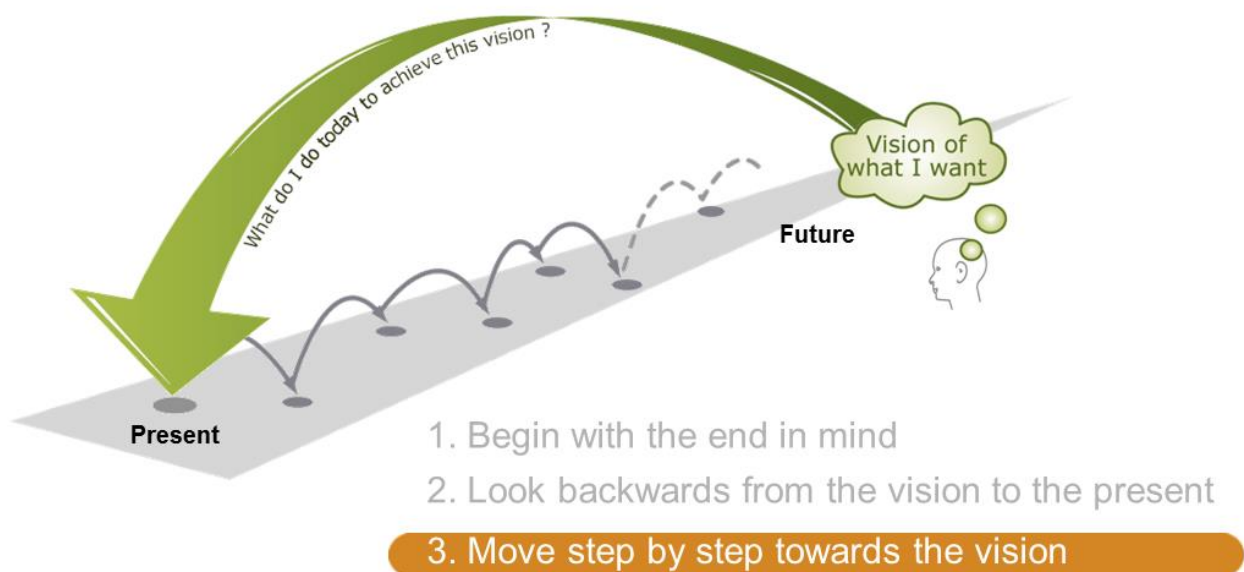
What is Imagine Montrose?

The Imagine Montrose Integrated Community Sustainability Plan (ICSP) is the vision, plan and process to continue our community's success over the next twenty years, and a way to position us to achieve sustainability in the longer-term.

The ICSP is the highest level guiding document for our community – with a practical decision-making framework that can be applied to all levels of decisions and used to guide all types of other plans, policies and programs (see Appendix D).

Simply put, this ICSP articulates the following key components:

- **Where we want to go:** Our goals, which describe our vision for the future
- **Where we are today:** A snapshot of our strengths, challenges, opportunities and threats so we have a sense of the present, or
- **How we're going to move forward:** Our strategic directions that will help us focus our resources over the coming years and actions ideas for consideration on how to begin moving forward.



How were community members involved?

The Advisory Committee (AC) worked closely with the consultant on developing the key elements of the ICSP, including the goals, current situation, strategic directions, action ideas and indicators.

Goals were developed with public input through an online survey and public events. A review and refinement process with the AC as well as a review of background documents and best practices also informed their development. A snapshot of the current situation was compiled using a 'strengths, weaknesses, opportunities and threats' (SWOT) analysis. The SWOT was developed using existing reports and online information and public survey results. It was then refined by the AC. Strategic directions and action ideas were identified, prioritized and refined by the AC, with public input gathered at an evening event.

Why Success and Sustainability?

Achieving success and sustainability will be a long-term journey – not something that can be accomplished overnight. Experience has shown that a major barrier to people's commitment to sustainability is their concern that sustainability will negatively impact the economy and the quality of their lives. While sustainability will require less resource consumption and waste, the goal is also to be successful – to have a strong, healthy economy and to enable a high quality of life for everyone.

The Imagine Montrose process is about envisioning a successful and sustainable future for our community and creating it together. To reach a positive future, we know that the goals and activities needed to get there must be desirable in order to motivate people to make it happen. Community success is defined by community members so that it reflects what the community wants the social, economic and environmental systems to look, feel and be like in the future. Sustainability then, is about ensuring that this future can continue forever within the constraints imposed on our planet and its finite resources.

What is Sustainability?

There are a number of ways to define sustainability or sustainable development. The United Nations Brundtland Commission, in the 1987 report, *Our Common Future*, introduced the term sustainable development as "development that meets the needs of the present without compromising the ability of future generations to meet their own needs."

This definition helped achieve global consensus that meeting the needs of current and future generations is absolutely dependent upon the health and viability of three completely interconnected systems:

1. the natural environment, which provides the services and finite resources that enable society and the economy to function;
2. society, which is sustained by the life-providing services of the natural environment, including air to breathe, water to drink and soil to grow food; and
3. the economy, which is governed by the rules of the other two and is dependent upon human labour and natural resources to thrive.

The Brundtland definition is certainly compelling, and it articulates the overall intent of the concept of sustainability; however additional detail is needed to more concretely identify the ultimate objectives that must be achieved to create a sustainable future. See the 'Our Sustainability Objectives' section to learn more about how Montrose will move toward a future that is sustainable.

Community History and Profile

Our Community – Yesterday

Source: Village of Montrose website

It was around 1942 that Leon Simmons had the idea of developing Woods Flats, an area of about 220 acres situated above the Columbia River east of Trail. This area was primarily owned by C.M. S. Co.(now Teck). Together with Trail lawyer A.G. Cameron, they formed Montrose Homesites Ltd. The name Montrose was chosen after a popular place in Scotland.

The land was surveyed into lots and shortly thereafter the Montrose Improvement Association was formed. The M.I.A. provided guidance, fire protection, and entertainment for the residents.

Montrose became an incorporated village on June 22, 1956, with a population of 707 citizens housed in 250 residences. The Montrose Improvement Association developed into a Council with a Chairman and four Commissioners. The Montrose Recreation Commission was formed soon after and continues today as an integral part of the Village's structure.

Montrose Today

Today, the population in Montrose is relatively stable at just over 1000 residents (1,030 in 2011 and 1,025 in 2006). The Village Council is made up of a Mayor and four Councillors. Like most other BC communities, a high proportion of Montrose residents are in their 50s and 60s and they are served well by a variety of programs, events and services offered in the region.

Montrose is located in the West Kootenay Region on a series of benches and slopes at the entrance to the Beaver Valley and beside the Columbia River. Montrose is home to a variety of wildlife indigenous to BC, such as black bears, deer and elk. Beaver Creek is known for its abundance of trout and the Columbia River serves as an important fresh water source and natural feature for the region.

Commercial amenities within Montrose include a Canada Post, gas station and a restaurant situated within municipal boundaries. Most residents are employed outside of the community, primarily in manufacturing, retail trade, health care and public administration. The region's largest employers include Teck Metals, Fortis BC and the Interior Health Authority. The unemployment rate in Montrose was 9.9% in 2011, which was up from 4.9% in 2006 and higher than the 6% unemployment rate for the rest of BC. The median income in Montrose was \$28,700 in 2011, down just 1% from 2006.

Most of the developable land in Montrose has been developed, primarily as resident housing. In 2011, there were 440 private dwellings, which are reportedly aging and somewhat small for the demands of families today. However, compared to the rest of BC, housing is fairly affordable with just 12% of Montrose homeowners spending more than thirty percent of their income on housing – the BC figure is 23%. Rental housing makes up a very small proportion of the market and all renters in the community were paying less than thirty percent on housing. In 2011, the population density was 704 residents/km², which is considerably higher than most of the other communities in the region.

The Montrose Recreation Commission is still very active, planning things like the Montrose Family Fun Day, Hallowe'en Party and much more. Despite being a small community, Montrose provides some recreation and

leisure opportunities for local residents. There are a handful of parks that provide spaces for people to gather and playgrounds for children. There is a baseball field, memorial gardens, a basketball court and a skate park. Not only do these spaces serve as important community hubs, they also promote and encourage an active and healthy lifestyle. The community hall offers bookings for public events and comes equipped with a commercial kitchen and smaller facilities. Local hiking trails offer locals a chance to enjoy the outdoors and their natural environment. The Antenna Loop, Flag Viewpoint and the Old Orchard Trails provide 7km and 310m of elevation gain with different route options ranging from 1.5 to 3hrs in duration. These trails provide spectacular views of the surrounding area.

Other recreation programs, events and facilities are offered to Montrose residents in Trail and Fruitvale through the Beaver Valley Recreation Department of the RDKB and the Trail Aquatic and Leisure Centre. A variety of programs and special events are offered throughout the year for adults, seniors, youth and preschoolers. There are also a number of sport and recreation associations in the region providing access to activities such as baseball, soccer, hockey, dance and others.

Montrose residents are well served by regional health and social services that are offered in surrounding towns and cities. The Kootenay Boundary Regional Hospital, which is located in Trail, is the back-bone of the health system for Montrose, the Lower Columbia and beyond. It offers services including core medical and surgical specialty services, core physician specialties, 24 hour emergency and trauma services, Level 2 laboratory, acute and obstetrical care, psychiatry, and chemotherapy. Between 2009 and 2010, there was an estimated 242 physicians for every 100,000 residents in the Trail Local Health Area (LHA), which is more than double the provincial average.

In 2011, almost ninety percent of residents held a high-school diploma or higher. While there are no schools located in Montrose, bus service transports students to Trail for high-school and Fruitvale for elementary school. Selkirk College is located in Trail and provides a wide variety of programs and co-op placements for prospective students.

The Village of Montrose has close to \$7M in infrastructure assets. These assets include: water, drainage, sanitary sewer, transportation fleets, facilities and land improvements/parks. While many function at a moderate to high performance level, other assets continue to age and are nearing the end of their operating life cycle, thus requiring significant investments annually to maintain them.

In 2010, the Village of Montrose adopted the Corporate Greenhouse Gas (GHG) Emissions Reduction Plan and has created a climate action reserve that will be used to fund projects that will help the Village achieve carbon neutrality. In 2010, the Village consumed a total of 136,702 (GJ) of energy (up 4% from 2007), resulting in an estimated 7,751 tonnes of CO₂ emissions in the delivery of its services.

While BC transit currently provides bus routes through Montrose to the surrounding district, private vehicles remain the preferred choice of transportation to and from work for residents. In 2006, approximately 80% of local residents over the age of 15 used private vehicles to commute to and from work.

For solid waste, the Village provides weekly curbside garbage pickup which is transported to the RDKB Landfill. Recycling is bi-weekly and provided through Multi-material BC.

Conservation bylaws are in place and used to limit peak water consumption. Two supply wells and a chlorination facility located at the confluence of Beaver Creek and the Columbia River pump the water to a pair of reservoirs that service Montrose. In 2014, the Village of Montrose used a total of 193,555 cubic meters of water, up 33% from the year before.

Where we're going & how we're moving forward

Our sustainability objectives (where we're going)

The community's four sustainability objectives (aka 'care instructions' for the earth), which are based on the Natural Step principles for sustainability, help shift sustainability from something abstract that we want, to something concrete that we can plan for and manage. They can then be used as a filter or lens to guide planning and decision-making, whether for internal, day-to-day decisions, or longer-term strategic direction.





The objectives are based on a scientific approach to sustainability. They are concrete and non-overlapping to simplify strategic planning, they focus on root causes of issues and they are specific yet non-prescriptive. Taken together they describe the four basic principles any organization, community or activity can work toward to be sustainable and live within the constraints imposed by finite natural resources.

The Natural Step principles have been in use for about 20 years, during which time governments, corporations and individuals have used the principles to quickly create a shared language and integrate it into visions and strategic directions.

Not every action toward a desirable successful community will meet all four sustainability objectives today, but over time, we need to create conditions where they ultimately do.

The four sustainability objectives are presented on the next page and in more detail at www.naturalstep.ca, or watch this fun 2-minute video! [<https://www.youtube.com/watch?v=FFCNCQleCuk>]

Our community's sustainability objectives are **to reduce and eventually eliminate our contribution to:**

 <p>Socio-cultural and economic conditions that undermine people's ability to meet their basic needs.</p>	 <p>The ongoing physical degradation of nature.</p>
<p>This generally means favouring activities that support:</p> <ul style="list-style-type: none"> • Safe, vibrant working and living conditions • Inclusive and transparent decision-making • Political freedoms • Affordable products and services; sufficient resources for livelihood 	<p>This generally means favouring activities that support:</p> <ul style="list-style-type: none"> • Materials and energy from well-managed ecosystems • Re-usable, recyclable and recycled content • Fast-growing crops (bamboo etc.) • Use of previously developed lands
 <p>The ongoing build-up of synthetic materials produced by society.</p>	 <p>The ongoing build-up of materials extracted from the earth's crust.</p>
<p>This generally means favouring activities that support:</p> <ul style="list-style-type: none"> • Natural, biodegradable materials (glass wood, cotton, water-based etc.) • Materials that are managed in tight technical cycles • Organically grown, untreated • Re-usable, recyclable and recycled content materials 	<p>This generally means favouring activities that support:</p> <ul style="list-style-type: none"> • Energy efficiency • Renewable energy • Metals that are plentiful (aluminum, iron etc...) • Recycled content materials • Natural, biodegradable materials • Materials that are managed in tight technical cycles • Re-usable, recyclable materials

Our community goals and strategic directions

In addition to our sustainability objectives that clarify where we need to position ourselves to be successful in the longer-term, our shared goals – developed by the community and for the community – further articulate ‘where we’re going,’ and then our strategic directions suggest where we need to focus our efforts for ‘how to move forward.’ Action ideas in Appendix B provide more detailed suggestions for moving forward that can be considered by those taking the lead on executing the strategic directions.

OUR GOALS (WHERE WE’RE GOING)

The goals collectively create the high-level ‘vision’ of a more successful and sustainable Montrose in 20 years.

They provide specific yet flexible outcomes that should be used to provide direction for more detailed planning and decision making. They can be used directly for decisions, or embedded into more detailed plans. For example, the Imagine Montrose goals were used to guide the development of the more detailed Village of Montrose 2015-2018 Strategic Plan, and this same approach can be used to guide a tourism plan or a detailed recreation and trails master plan.

All goals are equally important and inter-dependent; all that we do should ultimately support all six goals. While short-term trade-offs between them may sometimes be necessary, ultimately we should make progress toward all goals collectively in the long-term.

Indicators to measure performance related to the goals have been recommended and are included in this section in short form. Appendix B provides more information about indicators and the rationale for those recommended as part of this plan.

OUR STRATEGIC DIRECTIONS (HOW WE’RE MOVING FORWARD)

Strategic directions are the courses of action that should be taken in the next few years to begin to move our community toward the goals. The strategic directions presented on the next pages were recommended by the Advisory Committee and informed by ideas from other community members.

THE COMMUNITY SYSTEMS THAT FRAME IMAGINE MONTROSE

The manner in which this ICSP is organized seeks to address the opportunities and challenges from all the important issues across six community systems. While we don’t always think of our community as made up of an energy system, leisure system, health system, economic system, etc., we can all intuitively understand that they exist and will continue to exist into the future. All community systems are interconnected to some extent, and they all inextricably linked to the three aspects of sustainability – economic, social and environmental. For example, infrastructure encompasses the way various organizations, systems and people collaborate to meet the community’s energy, water, waste management and transportation needs, and the system has an impact on air quality, climate change, water ecology, the cost of doing business, etc. Working comprehensively to address the social, economic and environmental impacts will facilitate system-wide solutions that are long lasting and avoid the creation of unforeseen problems in other areas.

For Montrose, six focus areas were created to broadly cover and address our community-wide systems and the wide range of issues within them.

The six areas that provide structure for this plan are:

1. **Our Economy:** This area focuses on bringing dollars into Montrose, and optimizing the impact of dollars in the community in order to help support some local services and livelihoods. It extends to the region, recognizing that Montrose is part of a regional economy. It addresses opportunities for meaningful work, sustainable businesses and creating a positive climate for local business viability.
2. **Infrastructure:** This area is concerned with the supply of energy, water and materials, and also includes waste management, water treatment, stormwater management, transportation, and communications systems.
3. **Neighbourhoods and Housing:** This area includes the types, mix and character of all physical development, as well as the amount and timing of these developments. It includes residential dwellings, commercial, institutional and industrial neighbourhoods as well as their surrounding landscapes.
4. **Land Use and Natural Areas:** Includes where development occurs, where it shouldn't, and the protection of natural areas. It also addresses the protection of ecosystem integrity and biodiversity throughout the community, and the use of resources.
5. **Community and Individual Health:** This area is concerned with meeting residents' physical, mental, emotional, spiritual health through services, infrastructure, interactions, relationships and a strong community fabric. It also includes safety. From an individual perspective it addresses access to local and regional care services and health promotion, and to lesser extent, health enablers, such as recreation.
6. **Leisure, Learning and Recreation:** This area covers all arts, cultural, heritage, recreation and learning opportunities and the supporting built and natural infrastructure, resources and delivery agents. It addresses municipal, non-profit, private offerings and partnerships within and outside of Montrose.

Our Economy

GOALS FOR THE FUTURE (where we're going)

There is a diversity of small businesses in Montrose that contribute to the regional economy and to the local community, and entrepreneurs and small businesses are supported.

Montrose residents, businesses and other organizations support and benefit from the strong and diverse regional economy.

The population has grown such that it provides the tax base required for the community while maintaining the small-town character enjoyed for so long by residents.

Economic activities use land and resources efficiently, and they are transitioning to the use of renewable energy and sustainable materials.

RELATED INDICATORS (tracking our journey)

Local businesses and entrepreneurs

Real median income

Unemployment rate

STRATEGIC DIRECTIONS (how we're moving forward)

Attract visitors through regional collaboration on tourism development initiatives.

Attract new and support existing businesses and entrepreneurs.



Infrastructure

GOALS FOR THE FUTURE (where we're going)

Infrastructure systems meet the community's needs safely and reliably; they provide affordable services to residents without undermining the current and future financial viability of the systems.	Infrastructure systems are managed to avoid negative impacts on the natural environment, and natural resources are used efficiently and conservatively.	Montrose is moving toward zero waste through greater education regarding responsible purchasing choices and cost-effective waste diversion services that are convenient and affordable for residents and that keep the community free of garbage.	Safe transportation options, trails and reliable roads connect our community and link us to our neighbours, doing so in a way that supports local economic activity and the health of residents and the environment through the transition to more fuel-efficient and non-motorized modes.	Water is conserved and the water system provides high quality, safe and affordable drinking water to residents; wastewater and biosolids are managed to protect the natural environment.	A reliable, affordable energy supply exists, and our community is increasingly energy efficient and transitioning to more local renewable sources of energy that contribute to local economic activity and reduced greenhouse gas emissions.	Communication systems are up-to-standard, affordable and reliable.	Systems and procedures are in place for emergencies, effectively managing risks to people and property from natural and other disasters.
---	---	---	--	--	--	--	--

RELATED INDICATORS (tracking our journey)

Connectivity	Unemployment rate	Connectivity	Energy use
Greenhouse gas emissions	Satisfaction with infrastructure services	Waste landfilled	Waste water effluent quality
Water use	Drinking water quality	Commuting mode	

STRATEGIC DIRECTIONS (how we're moving forward)

Plan and secure funding for future infrastructure maintenance and upgrades.	Lobby for and support improvements to the public transportation system.	Improve waste diversion and enhance the waste collection system
---	---	---



Neighbourhoods and Housing

GOALS FOR THE FUTURE (where we're going)

Our communities and neighbourhoods are peaceful, quiet, safe and walkable; they provide indoor and outdoor places that are accessible and allow residents and visitors to gather, connect and find solitude.	Our neighbourhoods, homes and buildings are tidy, visually appealing, and reflective of the small-town character; residents contribute to these characteristics by taking care of private and public places.	Neighbourhoods are linked to community amenities by convenient trails, and they include green spaces and a community garden for people of all ages to enjoy outdoor activities.	There is a diversity of housing types and densities, including affordable and age-friendly options for a range of ages, abilities and incomes.	Homes and buildings are healthy, safe, increasingly energy-efficient and transitioning to the use of renewable energy and sustainable materials.
--	--	---	--	--

RELATED INDICATORS (tracking our journey)

Building repair	Building permits	Community character and cleanliness	Gathering places	Residential neighbourhood feel
-----------------	------------------	-------------------------------------	------------------	--------------------------------

STRATEGIC DIRECTIONS (how we're moving forward)

- Encourage and incentivize the creation of affordable seniors housing in the community.
- Improve street safety and walkability.



Land Use and Natural Areas

GOALS FOR THE FUTURE (where we're going)

<p>An abundance of natural areas, parks and scenic viewscapes are protected, and have been enhanced and restored where necessary.</p>	<p>Parks, natural areas and trails can be conveniently accessed from Montrose neighbourhoods and are well used and enjoyed by the region.</p>	<p>Development has been located to: avoid continuous encroachment into natural areas; avoid hazardous and ecologically sensitive areas; minimize energy use and greenhouse gas emissions; and use infrastructure systems efficiently.</p>	<p>An appropriate mix of land uses and development types in designated areas provides vibrancy and more convenient access to amenities.</p>	<p>Commercial, industrial and institutional areas support local economic development, yet are appropriately located and buffered to maintain the small town character and to avoid negative impacts on surrounding areas.</p>	<p>Community members are stewards of the natural environment and resources, understanding their connection to the current and long-term health of the community and economy.</p>	<p>There is an adequate supply of residential land that enables existing and new community members to reside in the area.</p>
---	---	---	---	---	--	---

RELATED INDICATORS (tracking our journey)

Access to natural areas

Developmental footprint

Protected natural areas

STRATEGIC DIRECTIONS (how we're moving forward)

Enable residential, commercial and recreational development opportunities, prioritizing infill over greenfield development.

Create a local culture of environmental stewardship and conservation.



Community and Individual Health

GOALS FOR THE FUTURE (where we're going)

Montrose is family-friendly and safe; it has attracted more families and young people, enhancing community vibrancy and economic viability.	There is respect, caring, understanding, interaction and connection amongst people of all ages; and community members are able to grow, mature and age in place safely and comfortably.	Community members are enabled to live healthy lifestyles and they take responsibility for their health and wellbeing.	Regional health and social services, including the regional hospital, are easily accessed by timely and convenient transportation options.	Community events, gathering spaces and a diversity of activities keep residents of all ages connected to each other and engaged in community life.	Residents are meaningfully informed about and involved in community decision-making; they take responsibility for and actively participate in community life.
---	---	---	--	--	---

RELATED INDICATORS (tracking our journey)

Resident population

Health status rating

Unlawful incidents

Sense of belonging and connection

STRATEGIC DIRECTIONS (how we're moving forward)

Attract and retain young people and families.	Address local housing stock limitations (age, size) that present barriers to attracting new residents.	Advocate for and support efforts to retain the regional status of the KBRH.	Motivate and encourage community members to participate in community and regional decision-making processes.
---	--	---	--



Leisure, Learning and Recreation

GOALS FOR THE FUTURE (where we're going)

<p>A range of recreation and leisure activities are available throughout the year for varying ages and abilities, and the offerings for children and young people have helped to attract families to town.</p>	<p>Good quality facilities and amenities exist, are well maintained and supported, and they are delivered within the financial means of the community.</p>	<p>Life-long learning opportunities are accessible locally or by convenient and affordable transportation and communications systems.</p>	<p>Regional schools are easily accessible by convenient and safe transportation options.</p>	<p>A diversity of accessible arts, culture and heritage offerings are locally available, which enhances community vibrancy.</p>
--	--	---	--	---

RELATED INDICATORS (tracking our journey)

Satisfaction with arts, culture and heritage offerings

Satisfaction with learning and education offerings

Satisfaction with recreation offerings

STRATEGIC DIRECTIONS (how we're moving forward)

Enhance access to recreation opportunities.

Grow the presence of art, culture and heritage in the community.



What's Next? A Guide for Implementation

Developing our ICSP is just one step of many in the community's journey toward our vision for success and sustainability. The ICSP articulates shared goals for the future success and sustainability of our community, and outlines a process for continuing along the journey toward those goals. It will require ongoing commitment toward implementation: alignment of decision-making and on-the-ground action. It also requires annual strategic planning, monitoring and reporting on progress, and continued development and implementation of the strategic directions and related actions. This section outlines the main areas for building on the ICSP and creating an ongoing process for moving Montrose toward success and sustainability.

Align planning and decision-making

The ultimate goal for the implementation phase of our ICSP is that decisions are aligned with the ICSP goals. These decisions include the formal decisions made by the Council on policies, plans and procedures, as well as the day to day decisions made by staff and community partners on projects, practices and purchasing.

There are many factors that are critical to successful changes processes, including passionate leadership, on the ground champions, aligned performance management systems, training and tools. The ICSP development process included a training workshop for decision-makers that should ideally be replicated on a regular basis and when turnover occurs in an organization.

Decision-makers should understand the ICSP framework and how to apply it to their decision-making. Further, they will likely benefit from integrating four strategic questions into existing decision tools to assist them through the process. The four questions to be consistently asked in all levels and types of decisions are:

- 1. Does the project/development/purchase/etc. move the community toward our goals?**
- 2. Does it move us toward our sustainability objectives?**
- 3. Is it a flexible platform for future steps toward our goals and sustainability objectives?**
In general, most initiatives have some trade-offs or conflicts with elements of the priorities or sustainability objectives. Flexible approaches and technologies will help ensure we are not faced with unacceptable costs, do not limit our ability to adapt, and instead enable the next steps and avoid trade-offs to achieve more success for our community in the future.
- 4. Will it provide a good return on investment?**
Ensuring that the community's money is spent wisely and effectively will always be an important part of decision-making. However, saving money in the short term is not always the best solution, nor is making a large investment where the payback period is too long.

These questions are included in a more detailed decision-making tool found in Appendix A.

Partner with stakeholders on implementation

Since the ICSP is a long-term plan, it is imperative that community and regional stakeholders participate as partners in the development and ongoing implementation of the plan. Partners can participate in determining the strategic directions, contribute to plan implementation and communications, and encourage other community partners to join in the journey.

To ensure that roles and responsibilities of community partners are clear, a partnership agreement signed between the communities and partner organizations can be a useful tool. The partnership agreement should articulate a commitment to the shared vision and desired outcomes articulated in the ICSP, as well as some principles for partnerships (e.g. collaboration, transparency). See the sample partnership agreement for what it could include.

While it is ideal that partners are on board during the development of the ICSP, they can come on board at any time.

Expand the Advisory Committee and consider task forces

The ICSP Advisory Committee (AC) played an instrumental role in the development of the plan. It would be ideal if the AC members continued to play a role in the ICSP implementation phase through annual review and planning, as well as in implementation of strategic directions where possible. Consideration should be given to expanding the AC over time to include the community organization representatives and stakeholders that will help to achieve the strategic directions.

Alternatively, task forces could be created to include community members and partner organization representatives to address each one of the six specific ICSP areas. The benefits of creating multiple task forces is that it increases the number of residents and stakeholders actively engaged in the process, shares the workload, and helps to broaden the perspectives and expertise brought to the table, thereby strengthening the outcomes overall. These benefits should be weighed against the resources it will take to convene multiple groups into the future. It should be noted that the task forces do not necessarily need to be convened all at the same time or even in the same year: a rotating schedule could be created such that the most urgent strategy areas are prioritized first and those task forces meet in year one.

Sample Partnership Agreement

Montrose residents have a desire to work collaboratively to enhance and strengthen their community and position it for future success and sustainability.

As Partners, we share the Imagine Montrose ICSP goals and sustainability objectives and we commit to participating in the ongoing journey by:

- Adopting the shared goals as a guide in the decisions and work that we do;
- Participating in annual strategic planning processes;
- Implementing strategic directions and actions assigned to us that are within our means; and
- Incorporating sustainability planning and implementation strategies in the way we do business.

As Partners, we are guided by these Partnership Principles:

- **Collaboration**
- **Integrity**
- **Inclusive**
- **Engagement**
- **Innovation**
- **Transparency**
- **Effective and open communication**

Annual strategic/action planning

Regardless of whether the AC continues or new/separate task forces are created, one or the other should be engaged in regular and ongoing planning to ensure that the ICSP continues to be a living process and, most importantly, that it creates on-the-ground action and results. Ideally this would be done on an annual basis, but should be done at least every other year. The planning process should continue in a manner similar to that which occurred during the process to develop the plan and the strategic directions.

STRATEGIC PLANNING WITH THE NEWLY ELECTED VILLAGE COUNCIL

A strategic planning process was undertaken early in 2015 with the newly elected Council and Village senior staff. The 'hot off the press' ICSP goals were used as the compass for identifying their priorities for the next four years, and the ICSP strategic directions were used as a filter to check that Village priorities covered the essential areas. The new Village of Montrose 2015-2018 Strategic Plan is now directly aligned with the Imagine Montrose ICSP – a great example of how the ICSP is intended to guide other plans and all decision-making.

Ongoing monitoring and reporting

Monitoring and reporting progress toward (or away from) the ICSP goals is essential to provide transparency, inform decision-making and enable continuous improvement. Ongoing, consistent and reliable monitoring provides the community with a number of essential functions and benefits, including:

- Informing decision-making throughout the community;
- Informing task force action planning;
- Ensuring transparency and accountability to community stakeholders; and
- Engaging businesses, residents and visitors in the journey toward the vision by providing meaningful and timely information in an interactive way.

Reporting in the same format and using the same metrics year after year will allow for identifying trends and systematic updating. If access to more specific data is available, it is a good idea to add supporting indicators to the initial set of perhaps more high-level indicators. For example, total energy used is an initial indicator; to delve further with more specific data, energy use can be reported by sector and by energy type as well. Don't be concerned that the latest data isn't available; simply use the most recent information that is. Different data providers provide results at different times of the year and some only every five years, so it is highly likely that you may not have all the most current information all the time.

One of the most important, yet often forgotten, steps in the monitoring and reporting process is celebrating successes - big or small. Celebrating successes is one of the most impactful things that can be done to maintain enthusiasm and strengthen buy-in for the ICSP. Make achievements public by posting on local government and partner websites, advertising in the local newspaper, and presenting at local gatherings.

See Appendix B for the recommended Imagine Montrose indicators.

Periodic review and refinement of the ICSP

Keeping the ICSP current and ensuring that it continues to connect with local values is another important factor to attend to moving forward. While action planning should occur on an annual basis, other elements of the plan should be held more constant so that they can effectively guide decision and action planning. However, the need for constancy should not outweigh the importance of reflecting the community's changing goals for the future. The one thing that will remain unchanged is the set of long-term sustainability objectives that guide the goals for success in the future. The other elements of the ICSP and suggestions for the frequency and method for updating them in the future are provided below.

- **Goals:** These should be reviewed and potentially refined every five years or so. Consideration should be given to undertaking another visioning process in ten years or so.
- **Strategic Directions and Actions:** The strategic directions should be reviewed annually if possible, or at least every two years through a strategic planning process. Corresponding actions for implementation should also be identified for each of the strategic directions.
- **Indicators:** The recommended indicators should be kept as constant as possible so that trends can be monitored and performance evaluated over time. However, transitioning to new and improved indicators as they become available should be considered annually so that decision-makers are armed with the best possible information.



Appendix A: A tool for decision-making

Montrose's Planning and Assessment Tool



Our shared community vision for success and sustainability is implemented through decision-making – from daily purchasing decisions to high-level strategic planning decisions.

This tool outlines four strategic questions to help you evaluate any type of decision or action, including plans, policies, projects, purchases, practices, etc. It is also available in Excel format, which can be helpful for more detailed assessments such as:

- OCP amendments/rezoning
- Major development proposals
- Other community-wide planning and infrastructure decisions
- Actions requiring a large investment of capital or staff time

For planning: Tools should be used at the start of projects to guide the planning/design and/or consideration of options.

For assessments: Tools can also be used to flag potential positive and negative impacts of whatever is being proposed and help you innovate ways to leverage the positives and avoid the negatives.

For choosing among alternatives: They can also be used to flag potential benefits and negative impacts of various alternatives to help you identify ways to avoid or minimize them and ultimately decide among the final options.

CONCEPT /PROPOSAL/PROJECT/ACTION NAME:

BRIEF DESCRIPTION:

1. TOWARD SUCCESS? (Summary)

Does the action/initiative support or conflict with the Imagine Montrose focus areas?	Conflicts	Neutral	Partially supports	Strongly supports
ECONOMY Includes employment, and wealth generation and circulation within the community.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
INFRASTRUCTURE Includes energy, water, waste, transportation, and communications.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NEIGHBOURHOODS AND HOUSING Includes the types, mix and character of development.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LAND USE AND NATURAL AREAS Includes where development occurs, where it shouldn't, and the protection of natural areas.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
COMMUNITY AND INDIVIDUAL HEALTH Includes the physical, mental and spiritual wellbeing of individuals and the social fabric of the community.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LEISURE, LEARNING AND RECREATION Includes: arts, culture and heritage; learning and education; active and passive recreation; and the facilities and venues that support them.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

1. TOWARD SUCCESS?

Does it support or conflict with our Goals?	Conflicts	Neutral	Partially supports	Strongly supports
ECONOMY				
1. There is a diversity of small businesses in Montrose that contribute to the regional economy and to the local community, and entrepreneurs and small businesses are supported.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Montrose residents, businesses and other organizations support and benefit from the strong and diverse regional economy.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. The population has grown such that it provides the tax base required for the community while maintaining the small-town character enjoyed for so long by residents.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Economic activities use land and resources efficiently, and they are transitioning to the use of renewable energy and sustainable materials.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CREATIVITY SPACE: If it is AWAY, how can you avoid or minimize this? How can you make it TOWARD? If it is NEUTRAL, how can you make it support?				
INFRASTRUCTURE				
1. Infrastructure systems meet the community's needs safely and reliably; they provide affordable services to residents without undermining the current and future financial viability of the systems.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Infrastructure systems are managed to avoid negative impacts on the natural environment, and natural resources are used efficiently and conservatively.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Montrose is moving toward zero waste through greater education regarding responsible purchasing choices and cost-effective waste diversion services that are convenient and affordable for residents and that keep the community free of garbage.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Safe transportation options, trails and reliable roads connect our community and link us to our neighbours, doing so in a way that supports local economic activity and the health of residents and the environment through the transition to more fuel-efficient and non-motorized modes.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Water is conserved and the water system provides high quality, safe and affordable drinking water to residents; wastewater and biosolids are managed to protect the natural environment.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. A reliable, affordable energy supply exists, and our community is increasingly energy efficient and transitioning to more local renewable sources of energy that contribute to local economic activity and reduced greenhouse gas emissions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Communication systems are up-to-standard, affordable and reliable.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Systems and procedures are in place for emergencies, effectively managing risks to people and property from natural and other disasters.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CREATIVITY SPACE: If it is AWAY, how can you avoid or minimize this? How can you make it TOWARD? If it is NEUTRAL, how can you make it support?				
NEIGHBOURHOODS AND HOUSING				
1. Our communities and neighbourhoods are peaceful, quiet, safe and walkable; they provide indoor and outdoor places that are accessible and allow residents and visitors to gather, connect and find solitude.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Our neighbourhoods, homes and buildings are tidy, visually appealing, and reflective of the small-town character; residents contribute to these characteristics by taking care of private and public places.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Neighbourhoods are linked to community amenities by convenient trails, and they include green spaces and a community garden for people of all ages to enjoy outdoor activities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. There is a diversity of housing types and densities, including affordable and age-friendly options for a range of ages, abilities and incomes.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Homes and buildings are healthy, safe, increasingly energy-efficient and transitioning to the use of renewable energy and sustainable materials.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CREATIVITY SPACE: If it is AWAY, how can you avoid or minimize this? How can you make it TOWARD? If it is NEUTRAL, how can you make it support?				

Does it support or conflict with our Goals?

Conflicts

Neutral

Partially supports

Strongly supports

LAND USE AND NATURAL AREAS

1. An abundance of natural areas, parks and scenic viewsapes are protected, and have been enhanced and restored where necessary.
2. Parks, natural areas and trails can be conveniently accessed from Montrose neighbourhoods and are well used and enjoyed by the region.
3. Development has been located to: avoid continuous encroachment into natural areas; avoid hazardous and ecologically sensitive areas; minimize energy use and greenhouse gas emissions; and use infrastructure systems efficiently.
4. An appropriate mix of land uses and development types in designated areas provides vibrancy and more convenient access to amenities.
5. Commercial, industrial and institutional areas support local economic development, yet are appropriately located and buffered to maintain the small town character and to avoid negative impacts on surrounding areas.
6. Community members are stewards of the natural environment and resources, understanding their connection to the current and long-term health of the community and economy.
7. There is an adequate supply of residential land that enables existing and new community members to reside in the area.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

CREATIVITY SPACE: If it is AWAY, how can you **avoid or minimize** this? How can you make it TOWARD? If it is NEUTRAL, how can you make it support?

COMMUNITY AND INDIVIDUAL HEALTH

1. Montrose is family-friendly and safe; it has attracted more families and young people, enhancing community vibrancy and economic viability.
2. There is respect, caring, understanding, interaction and connection amongst people of all ages; and community members are able to grow, mature and age in place safely and comfortably.
3. Community members are enabled to live healthy lifestyles and they take responsibility for their health and wellbeing.
4. Regional health and social services, including the regional hospital, are easily accessed by timely and convenient transportation options.
5. Community events, gathering spaces and a diversity of activities keep residents of all ages connected to each other and engaged in community life.
6. Residents are meaningfully informed about and involved in community decision-making; they take responsibility for and actively participate in community life.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

CREATIVITY SPACE: If it is AWAY, how can you **avoid or minimize** this? How can you make it TOWARD? If it is NEUTRAL, how can you make it support?





LEISURE, LEARNING AND RECREATION

1. A range of recreation and leisure activities are available throughout the year for varying ages and abilities, and the offerings for children and young people have helped to attract families to town.
2. Good quality facilities and amenities exist, are well maintained and supported, and they are delivered within the financial means of the community.
3. Life-long learning opportunities are accessible locally or by convenient and affordable transportation and communications systems.
4. Regional schools are easily accessible by convenient and safe transportation options.
5. A diversity of accessible arts, culture and heritage offerings are locally available, which enhances community vibrancy.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

CREATIVITY SPACE: If it is AWAY, how can you **avoid or minimize** this? How can you make it TOWARD? If it is NEUTRAL, how can you make it support?

2. TOWARD SUSTAINABILITY?

Does it move us toward our Sustainability Objectives?	...in favour of these approaches?	AWAY	Neutral?	TOWARD
 <p>To eliminate our contribution to creating socio-cultural/economic conditions that undermine people’s ability to meet their basic needs.</p>	<ul style="list-style-type: none"> • Safe, vibrant working and living conditions • Inclusive and transparent decision-making • Political and speech freedoms • Affordable products and services; sufficient resources for livelihood 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 <p>To eliminate our contribution to the ongoing physical degradation of nature.</p>	<ul style="list-style-type: none"> • Using energy and materials efficiently • Materials and energy from well-managed ecosystems • Use of previously developed lands • Re-usable, recyclable and recycled content • Fast-growing crops (hemp, bamboo etc...) 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 <p>To eliminate our contribution to the ongoing build-up of persistent synthetic materials produced by society.</p>	<ul style="list-style-type: none"> • Using synthetic materials efficiently • Natural, biodegradable materials (wood, cotton, water-based etc.) • Synthetic materials kept out of nature from creation to use • Organically grown, untreated • Using re-usable, recyclable and recycled content materials 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 <p>To eliminate our contribution to the ongoing build-up of materials that are drawn out from the Earth’s crust.</p>	<ul style="list-style-type: none"> • Energy efficiency and energy from renewable sources • Metals that are plentiful and used efficiently • Re-usable, recyclable and, recycled content materials • Natural, biodegradable materials • Extracted materials kept out of nature from extraction to use 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p>CREATIVITY SPACE: If it is AWAY, how can you avoid or minimize this? How can you make it TOWARD? If it is NEUTRAL, how can you make it support?</p>				

3. FLEXIBLE PLATFORM?

In general, most initiatives will have some tradeoffs or conflicts with elements of the priority goals or sustainability objectives. Flexible approaches and technologies will help ensure we are not faced with unacceptable costs and do not limit our ability to adapt. Instead, flexible approaches avoid tradeoffs and enable the next steps to achieve more success for our community in the future.

FAVOUR	AVOID
<ul style="list-style-type: none"> • Efficiency measures (e.g. reduced consumption, energy efficiency) • Approaches that are adaptable, modular, scalable • Things that build stronger community/stakeholder support for your initiatives • Pilot investments where you can test results and unintended consequences before scaling up • Approaches that fit in with how things will work in the future • Can be improved upon quite easily in the future 	<ul style="list-style-type: none"> • Things that tie you into using current technologies for a long time • Partial solutions that cannot be further improved upon (i.e. dead-ends with many tradeoffs) • Significant investments that lock you into a single way of doing things • Things that tie up too much resources (time/money) in partial solutions • Things that do not align with new ecological/economic/social standards
<p>Explain how the action is a flexible platform.</p>	<p>CREATIVITY SPACE: Explain how the action might have some of these characteristics and what can be done to avoid them.</p>

4. GOOD RETURN ON YOUR INVESTMENT?

Ensuring that you spend the community’s money most wisely and effectively will always be an important part of decision-making. However, saving money in the short term is not always the best solution, nor is making a large investment with too long of a payback period.

Notes:

- If an action is something that must be done for regulatory reasons, the return on the investment may not be relevant; however, you may be able to consider different ways to fulfil the regulatory requirement.
- If someone else is bearing the brunt of the costs (e.g. a developer), then this section may be irrelevant for the municipality, but you may want to consider if the costs passed down to others is acceptable.

	By Year 1	By Year 3	By Year 5	By Year 10	By Year 20
A: Capital Cost: \$ _____					
B: Operating/Financing costs/per year:	-\$	-\$	-\$	-\$	-\$
C: Estimated annual savings from BAU (i.e. increased staff productivity, reduced operating or maintenance costs (\$))	\$	\$	\$	\$	\$
D: Estimated revenue streams (increases in annual user fees, DCCs, grants, or acceptable new tax revenue streams (\$))	\$	\$	\$	\$	\$
SIMPLE PAYBACK = A/(B+C+D) ____ years Shorter payback is less risky					
Explain the simple payback on fixed investments and the nature of the return on investment over the lifetime of the project through cost savings or other acceptable revenue streams.					
CREATIVITY SPACE: If the payback is long or negative, or the financial support weak, the vision benefits may still outweigh the costs. Can you transfer money from somewhere else in the budget?					

SUMMARY

Strengths	Weaknesses
Based on the four questions, what benefits/value does the project deliver that makes it worthy of the time or financial investment?	Based on the four questions, what must be addressed moving forward to ensure the project’s critical weaknesses are avoided or minimized?

Conclusion/Recommendation:

Appendix B: Indicators for ‘where we’re going’

These indicators are recommended for measuring and reporting how well Montrose is progressing toward the goals within each of the six ICSP areas. Monitoring and reporting progress toward (or away from) the goals is essential to provide transparency, inform decision-making and enable continuous improvement. For more about indicator monitoring and reporting, see the ‘What’s Next?’ section in the plan.

IMAGINE MONTROSE - RECOMMENDED INDICATORS				
Goal Area	#	Short Name	Long Name	What is being measured
All	1	Quality of life	Resident satisfaction with quality of life in the community (survey)	This is a very high level indicator that takes all aspects of the community into account, including recreation, leisure, arts, culture, education, infrastructure, social connections, etc.
Leisure, Learning and Recreation	2	Satisfaction with arts, culture and heritage offerings	Resident satisfaction with arts, culture, heritage offerings (% satisfied and very satisfied)	This is will provide a high level assessment of resident satisfaction with program diversity and quality, service received, facilities, etc.
Leisure, Learning and Recreation	3	Satisfaction with learning and education offerings	Resident satisfaction with learning and education offerings (% satisfied and very satisfied)	This is will provide a high level assessment of resident satisfaction with program diversity and quality, service received, facilities, etc.
Leisure, Learning and Recreation	4	Satisfaction with recreation offerings	Resident satisfaction with recreation offerings (% satisfied and very satisfied)	This is will provide a high level assessment of resident satisfaction with program diversity and quality, service received, facilities, etc.
Community and Individual Health	5	Resident population	Total resident population, including breakdown by age group.	This measures Montrose's ability to attract and retain residents.
Community and Individual Health	6	Health Status Rating	Proportion of residents rating excellent or very good health.	This indicator reports the self-rated health of residents. Health in this case pertains to overall physical, mental and social health as well as general overall wellbeing.
Community and Individual Health	7	Unlawful Incidents	Number of criminal code incidents	Uniform Crime Reporting (UCR) surveys report the incidence and type of reported crime within Whistler.
Community and Individual Health	8	Sense of belonging and connection	Proportion of residents who feel a sense of belonging and connection to the community.	
Economy	9	Local businesses and entrepreneurs	Number of business licenses and the mix of new, renewed and non-renewed.	The intent is to measure the number of businesses and entrepreneurs based in Montrose. Unfortunately tracking 'business licenses' is an imperfect method since not everyone working from home will choose to purchase a license. This indicator reports on the mix of new business licenses, renewals and non-renewed business licenses.
Economy	10	Real Median Income	Median income tracked against inflation-adjusted income	This indicator tracks tax filer median income compared against income adjusted for inflation. If the income level is above the inflation line, then the community's purchasing power is greater than the start year.

IMAGINE MONTROSE - RECOMMENDED INDICATORS

Goal Area	#	Short Name	Long Name	What is being measured
Economy	11	Unemployment Rate	Unemployment rate of residents in the work force	This indicator measures the proportion of individuals who are not currently working but are actively seeking work.
Infrastructure	12	Connectivity	Communications technology speed and accessibility.	This compares Montrose communications technology (and the proportion of residents with access to it) to that of surrounding communities or to the CRTC minimum speed target. A resident survey could also be used to gauge satisfaction.
Infrastructure	13	Energy Use	Total energy used, including transportation energy	Total energy used includes electricity delivered, the energy used to generate space and water heating/cooling, as well as transportation energy. Not included is the embodied energy of the products used in the community.
Infrastructure	14	Greenhouse Gas Emissions	Total greenhouse gas (GHG) emissions	Total greenhouse gas (GHG) emissions results include the GHGs created from generating the electricity that we use, the energy used to generate heat/cooling, transportation energy for the larger fleets of vehicles and estimates of the emissions from intra-community transportation as well emissions resulting from landfilled waste
Infrastructure	15	Satisfaction with infrastructure services	Proportion of residents satisfied with energy reliability, water and air quality, waste management services.	
Infrastructure	16	Waste Landfilled	Total waste sent to the landfill.	This indicator represents the estimated proportion of materials landfilled.
Infrastructure	17	Waste Water Effluent Quality	Number of days waste water discharge flows are out of compliance with provincial permit requirements	This indicator tracks the number of days where effluent (water leaving the waste water plant) test results are out of compliance with the permit standards.
Infrastructure	18	Water Use	Total water use	Water use measures the total of water extracted then delivered from water plants and non-potable systems to end users.
Infrastructure	19	Drinking Water Quality	Drinking water quality measured by current standards	This indicator measures the quality of the drinking water by the number of instances of boil water advisories
Infrastructure	20	Commuting mode	Transportation mode to and from work	Proportion of employed labour force using non single occupancy vehicles for transport to work

IMAGINE MONTROSE - RECOMMENDED INDICATORS

Goal Area	#	Short Name	Long Name	What is being measured
Infrastructure	19	Drinking Water Quality	Drinking water quality measured by current standards	This indicator measures the quality of the drinking water by the number of instances of boil water advisories
Infrastructure	20	Commuting mode	Transportation mode to and from work	Proportion of employed labour force using non single occupancy vehicles for transport to work
Land Use and Natural Areas	21	Access to natural areas	Resident satisfaction with trails, parks and access to natural areas (% satisfied and very satisfied)	This is will provide a high level assessment of resident satisfaction with these amenities
Land Use and Natural Areas	22	Development Footprint	Area or percentage of developed land within municipal boundaries	The physical footprint of the developed area is calculated for this indicator. Developed areas include all zoned boundaries of land except for those zoned as parks, protected areas or extremely low density parcels of land.
Land Use and Natural Areas	23	Protected Natural Areas	Area of protected natural land.	The total area of land that has some form of protection.
Neighbourhoods, Housing and Land Use	24	Building Repair	Percentage of dwellings requiring major repair	Percentage of dwellings requiring major repair
Neighbourhoods, Housing and Land Use	25	Building permits	Number of building permits per year	
Neighbourhoods, Housing and Land Use	26	Community character and cleanliness	Resident satisfaction with community character and cleanliness.	This indicator measures residents' satisfaction (% satisfied and totally satisfied) with community character and cleanliness (public and private properties separately).
Neighbourhoods and Housing	27	Gathering places	Resident satisfaction that there are spaces for them to connect with others in the community when they want to.	
Neighbourhoods and Housing	28	Residential neighbourhood feel	Proportion of residents satisfied or very satisfied with the look/feel of Montrose residential neighbourhoods and commercial area.	This indicator measures residents' satisfaction with the look/feel of Montrose neighbourhoods - those who select the top 2 choices on a five point scale.

Appendix C: Where we are now

This high-level strengths, weaknesses, opportunities and threats (SWOT) information provides a snapshot of where Montrose is today with respect to the community goals for the future. It is not a comprehensive research piece; rather, it was compiled using information gathered from background documents, online research and input from the Imagine Montrose Advisory Committee. It is a tool used in planning to quickly identify the critical factors affecting an organization or community.

Strengths/Assets Things that give the community an advantage and can be leveraged for future success and sustainability	Weaknesses Characteristics/things that place the community at a disadvantage
<p>People and Place</p> <ul style="list-style-type: none"> Fairly stable resident population of approximately 1,000 (1,012 in 2006 and 1,015 in 2011) Rural and small town feel provides comforting and supportive social atmosphere for residents, and it allows for peaceful escape from the stresses of fast-paced urban life Relatively affordable place with only 12% of homeowners spending more than 30% of their income on housing (provincial average is nearly double); the average housing value of a home in Montrose was \$167,688 in 2006 Easily accessible regional recreation assets in neighbouring Trail and Fruitvale; good collaboration on rec programs in the Beaver Valley Elevation makes for cool summer nights and clear winter days which is ideal for tourists. <p>Socio-economic</p> <ul style="list-style-type: none"> Member of the Lower Columbia Initiatives Corporation (LCIC) – an initiative designed to strengthen and diversify the local economies of the Lower Columbia Region. Average personal income in Montrose is \$57,000 according to the Individual Tax Statistics by Area <p>Natural Environment and Resources</p> <ul style="list-style-type: none"> Close proximity to local trails and many scenic areas including Beaver Valley and the Columbia River. 2011 Water Smart Action Plan has set targets and objectives for water conservation. Village of Montrose adopted the Corporate Greenhouse Gas (GHG) Emissions Reduction Plan with the goal of becoming carbon 	<p>People and Place</p> <ul style="list-style-type: none"> Relatively sprawled and car dependent community with limited but workable public transit; almost 90% of residents commute to and from work in private vehicles. Limited local amenities within municipal boundaries (i.e. post office, gas station, convenience and liquor store, and a restaurant are the only options at present) Limited recreation and leisure opportunities in Montrose, but good rec assets in neighbouring Trail and Fruitvale. Arts and culture not prominent in the community Highway runs through town but there is no destination to entice visitors to stop Aging population <p>Socio-economic</p> <ul style="list-style-type: none"> No broadband internet in the community Unemployment rate is slightly higher than provincial average. There are few businesses located in Montrose – only 11 business licenses were purchased in 2011, representing just 1% of the licenses held in the Lower Columbia; most residents have to find employment outside of the community in neighbouring municipalities such as Trail and Castlegar. Selkirk College Trail Campus is underutilized for training and apprenticeship opportunities. <p>Natural Environment and Resources</p> <ul style="list-style-type: none"> Location on the edge of a mountain makes it difficult to expand development. Not as much diversity in flora and fauna when compared to other BC communities in the province. Drinking water quality has declined <p>Built Environment</p> <ul style="list-style-type: none"> Assets and infrastructure are continuing to age and are nearing the end of their operating life cycle Seniors housing: limited housing options for seniors and this is a large demographic in the community (largest age demographic is between 50-59 and will be retiring).

<p>neutral be 2012.</p> <ul style="list-style-type: none"> • Shares its natural environment with a variety of wildlife indigenous to British Columbia such as black bears, deer, moose, cougars and elk. <p>Built Environment</p> <ul style="list-style-type: none"> • The Village has identified the need for a Capital Asset Management Plan in accordance with the recommendations put forth by the Public Sector Accounting Board to manage failing assets. <p>Individual and Community Health</p> <ul style="list-style-type: none"> • 242 physicians per 100,000 residents in the Trail Local Health Area (LHA); which is more than double the provincial average • High percentage of individuals with high school diploma or higher (90%) • Voluntary on-call local fire department 	<ul style="list-style-type: none"> • Aging housing stock: There is little diversity in the housing stock in terms of smaller units and rental options – housing is mostly single family private dwellings and these are small, older homes not well-suited to attract new families to town. Only 4% of Montrose homes are rental units. • Building permit counts are relatively low compared to other Lower Columbia communities – there were 11 in 2011. <p>Individual and Community Health</p> <ul style="list-style-type: none"> • Limited recreational opportunities • No schools within municipal boundaries and the perception that that school system doesn't currently work well even though school kids in Montrose report a preference to going to school in neighbouring communities with more kids • The percentage of students eating 5 or more servings of fruits and vegetables per day in the local health area was 11% less than the provincial average for grade three and four students in 2011.
<p>Opportunities Things we can use for mutual benefit and to help us achieve our goals</p>	<p>Threats/Challenges Things beyond our control that could cause us trouble; make it difficult for us to achieve our goals</p>
<p>Economic and Tourism</p> <ul style="list-style-type: none"> • Columbia Basin Trust – potential increase in funding and review of strategic priorities underway through the “Our Trust Our Way” campaign • Lower Columbia Initiatives Corporation (LCIC) works collaboratively with the communities in the Lower Columbia region, local agencies, organizations and businesses to develop and implement strategies that will assist in strengthening our local economy and provides economic development services within the Lower Columbia Region. • The Lower Columbia Community Development Team Society (LCCDTS) works to advance the social and economic strength in the Lower Columbia • Work West Kootenays markets the region and employment opportunities to young people in Vancouver and Northern BC • Columbia Basin Broadband Corporation is working with Basin communities and rural areas to improve connectivity through a region-wide fibre optic cable network. • Regional tourism marketing initiatives (Go Kootenays) 	<ul style="list-style-type: none"> • Higher paying jobs in Northern BC and Alberta • Climate change – potential impacts on local climate and water sources • Urbanization is drawing many young people away from small towns to larger cities • Potential loss of Kootenay Boundary Regional Hospital to Castlegar • Forest fires • Columbia River pollution

Appendix D: Action ideas for moving forward

How Montrose will begin to move forward toward the goals is captured by the strategic directions, which are the courses of action that should be focused on in the next few years. These were included in section X and are provided again here as a way to organize the action ideas – the specific projects should be considered for implementation. The action ideas were recommended by the Advisory Committee, and were informed by ideas from the community.

Each SD will be proposed to the lead agency, who will then decide whether it should be accepted, deferred or declined. The lead agencies will be relied upon to determine the specific actions to undertake to move each SD forward to completion.

	STRATEGIC DIRECTIONS	ACTION IDEAS
Economy	1. Attract visitors through regional collaboration on tourism development initiatives.	<ul style="list-style-type: none"> - Host events/festivals that help to attract people to the community (e.g., craft fair, sporting event, BBQ cook-off) - Provide Montrose marketing information to the Lower Columbia Initiatives Corporation
	2. Attract new and support existing businesses and entrepreneurs.	<ul style="list-style-type: none"> - Explore opportunities to improve speed/reliability of the Internet connection to Montrose, consulting with the Columbia Basin Trust Broadband Corporation and the Trail Broadband Committee. - Explore ways to encourage home-based businesses - Create a local business/service provider directory or 'sharing forum' to improve access to local services, both formal and informal
Infrastructure	3. Plan and secure funding for future infrastructure maintenance and upgrades.	<ul style="list-style-type: none"> - Focus on water system upgrades initially - Improve bus route roads with grant funding
	4. Lobby for and support improvements to the public transportation system.	<ul style="list-style-type: none"> - TBD
	5. Improve waste diversion and enhance the waste collection system	<ul style="list-style-type: none"> - Explore options for a community composting system and collection service - Offer garbage bags that are biodegradable and offer a smaller size option - Offer garbage bag stickers so residents can use their own bags and won't have to put their bags into the municipal ones.
Community and Individual Health	10. Attract and retain young people and families.	<ul style="list-style-type: none"> - Host a wellness clinic and fair once or twice a year in Montrose - Programs and care for young children (RDKB Beaver Valley Recreation) - Survey families to determine needs for Montrose-based recreation offerings for children and youth (RDKB Beaver

		Valley Recreation)
	11. Address local housing stock limitations (age, size) that present barriers to attracting new residents.	<ul style="list-style-type: none"> - Provide generic renovation tips and standards to inspire locals to invest in and enhance their homes and properties - Investigate incentive options to encourage home renovations - Assist homeowners by providing easy to follow information about the with renovation restrictions and the variance process (Village)
	12. Advocate for and support efforts to retain the regional status of the Kootenay Boundary Regional Hospital.	<ul style="list-style-type: none"> - Continue to lobby Interior Health and work with KBRH board (Mayor and Council)
	13. Motivate and encourage community members to participate in community and regional decision-making processes.	<ul style="list-style-type: none"> - Host events that enable residents to connect with Council and each other and consider including food/drinks and some 'hot community topics' for discussion and idea generation (Village) - Suggestion box at the Post Office - Feedback and ideas page on the website (Village) - Educate residents regarding the role they play in the community's success
Leisure, Learning and Recreation	14. Enhance access to recreation opportunities.	<ul style="list-style-type: none"> - Participate in efforts to resolve the dual fee recreation system (Village) - Explore funding and location for outdoor exercise equipment - Extend Antennae Trail and develop the recreation area (Columbia Trails Society) - Develop a walking trail down the highway ('the cut')
	15. Grow the presence of art, culture and heritage in the community.	<ul style="list-style-type: none"> - Pursue grants to enhance arts, culture and heritage in Montrose - Display art throughout the community, including the Village office
Neighbourhoods and Housing	6. Encourage and incentivize the creation of affordable seniors housing in the community.	<ul style="list-style-type: none"> - Conduct a housing needs assessment for Montrose, including a focus on seniors housing needs - Establish incentives and remove barriers to the development of seniors housing - Investigate public-private partnership (P3) opportunities for available multi-family properties
	7. Improve street safety and walkability.	<ul style="list-style-type: none"> - Explore funding for and the partnerships necessary to build an overpass across highway - Complete a street and cross-walk lighting audit to identify priority areas for safety improvements and energy saving opportunities

		- Improve the safety of the three highway crossings
Land Use and Natural Areas	8. Enable residential, commercial and recreational development opportunities, prioritizing infill over greenfield development.	<ul style="list-style-type: none"> - Inventory land and create a map of and then market available land for development, prioritizing infill over greenfield development. - Create information for developers and homeowners to facilitate development in Montrose (Village of Montrose)
	9. Create a local culture of environmental stewardship and conservation.	<ul style="list-style-type: none"> - Host speaker events in Montrose and explore corporate/CBT funding and potential to connect to seniors luncheons - Integrate sustainability/stewardship into local schools, and consider using seniors to facilitate more intergenerational connections

