

Strategic Planning Meeting
May 8, 2026
10:00 am
Agenda

Call to order

Silence of Electronic Devices

Approval of Agenda

1. Opening and Session Overview

- Purpose of the session
- Review of meeting outcomes

2. Current State Overview

- Financial outlook
- Infrastructure and asset overview
- Staffing capacity and organizational considerations

3. Council Discussion: What Matters Most

- Identification of priorities and non-negotiables
- Key considerations for future governance decisions

4. Next Steps and Direction

- Identification of information gaps
- Next steps and responsibilities

Preparation for Strategic Planning Session

Meeting Outcomes:

- Establish a shared understanding of the Town's current financial, infrastructure, and staffing realities
 - Identify the key criteria that will guide Council's evaluation of future governance options
 - Discuss next steps to support informed decision-making
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1. Current Realities

- What do our current financial trends suggest about Lockeport's long-term sustainability?
 - Based on what we own and operate, are we confident in our ability to maintain our infrastructure at the expected level?
 - Given our current staffing model, what are we realistically able to deliver—and where are the gaps?
 - If nothing changes, what concerns you most about where we are heading?
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2. What Matters Most

- If we were to consider any changes to how we operate or govern, what must be protected or achieved for Lockeport?
 - What does that look like in practice (e.g., representation, taxation, service levels, local decision-making)?
 - What would you consider to be non-negotiable for the community?
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3. Looking Ahead

- What information do we need in order to make informed decisions moving forward?
 - Are there specific questions or concerns you feel need to be addressed as part of this process?
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This session is not intended to make decisions on specific options, but rather to ensure we are aligned on our current position and how we will approach future decisions.

**Strategic Planning Meeting
Financial Outlook
May 8, 2026**

- a. Causeway
- b. Emergency Access at Calf Island Road
- c. Roads
- d. Public Works Trucks
- e. New Fire Truck
- f. Roods Head
- g. Accessible Public Washrooms
- h. Crescent Beach centre Paved parking Lot
- i. Electrified Causeway Poles
- j. Buoys refreshed
- k. Town designated Parking Lot in Commercial District with electric Vehicle charging Station
- l. Beautification of the Town
- m. Additional Parking at or near the Beach Centre

Lockeport Municipal Asset Priority Overview

| Asset | Average | DA | AC | CH | KC | CM |
|------------------------------|---------|----|----|----|----|----|
| Fire Hall | 1.0 | 1 | 1 | 1 | 1 | 1 |
| Lighthouse Stage/ MFR Garage | 1.0 | 1 | 1 | 1 | 1 | 1 |
| Roads & Sidewalks | 1.0 | 1 | 1 | 1 | 1 | 1 |
| Sewar Plant | 1.0 | 1 | 1 | 1 | 1 | 1 |
| Town Hall | 1.0 | 1 | 1 | 1 | 1 | 1 |
| Public Works Building | 1.0 | 1 | 1 | 1 | 1 | 1 |
| Alarm Tower | 1.2 | 1 | 1 | 1 | 1 | 2 |
| MFR - Vehicle & Equipment | 1.3 | 2 | 1 | 1 | 1 | |
| Causeway | 1.4 | 1 | 1 | 1 | 3 | 1 |
| Vehicles (Fire / MFR) | 1.4 | 2 | 1 | 1 | 1 | 2 |
| Streetlights | 1.5 | 1 | 1 | 1 | 3 | |
| Athletic Fields | 1.6 | 1 | 2 | 2 | 1 | 2 |
| Lockeport Elementary School | 1.6 | 2 | 1 | 2 | 2 | 1 |
| Lockeport High School | 1.6 | 2 | 1 | 2 | 2 | 1 |
| Boardwalk | 1.8 | 1 | 2 | | 2 | 2 |
| Cenotaph | 1.8 | 2 | 1 | 2 | 2 | 2 |
| Crescent Beach Centre | 1.8 | 1 | 2 | 1 | 3 | 2 |
| Pavillion (Seacaps Park) | 1.8 | 1 | 2 | 2 | 2 | 2 |
| Playpark | 1.8 | 2 | 2 | 2 | 2 | 1 |
| Trails / Bridges / Ramps | 1.8 | 1 | 2 | 2 | 2 | 2 |
| Tennis Courts | 2.2 | 2 | 2 | 2 | 2 | 3 |
| Widows Walk (Lookoff) | 2.4 | 1 | 3 | 2 | 3 | 3 |
| Bandstand | 2.6 | 3 | 3 | 2 | 3 | 2 |
| Canteen | 2.6 | 3 | 2 | 2 | 3 | 3 |
| Medical Centre | 2.6 | 2 | 3 | 3 | 2 | 3 |
| Murals / Signs | 2.6 | 2 | 3 | 2 | 3 | 3 |
| Shanties | 2.6 | 3 | 3 | 2 | 3 | 2 |
| Cultural Park | 2.8 | 3 | 2 | 3 | 3 | 3 |
| Storage Barns | 2.8 | 3 | 3 | 3 | 2 | 3 |
| Library | 3.0 | 3 | 3 | 3 | 3 | 3 |
| Museum (2) | 3.0 | 3 | 3 | 3 | 3 | 3 |
| Rodd's Head Park | 3.0 | 3 | 3 | 3 | 3 | 3 |
| School Annex Building | 3.0 | 3 | 3 | 3 | 3 | 3 |

TOWN OF LOCKEPORT

FUTURE STAFFING REPORT

Incorporating Retirement Factor

Date: May 7, 2026

Prepared By: June Harding, Town Clerk/Treasurer

1. Executive Summary

This report provides an overview of the Town of Lockeport's current staffing complement and evaluates anticipated workforce changes due to upcoming retirements. The analysis identifies potential risks to service delivery and outlines recommended strategies to ensure continuity of operations.

Key Highlights:

- Total Staff Complement: Four full-time
- Employees Eligible to Retire:
 - Within 1 Year: June Harding, Town Clerk/Treasurer, Wayne Chetwynd, Public Works Assistant
 - Within 3 Years: Kevin Snow, Working Streets Foreman
 - Within 5 Years:
- High-Risk Departments/Positions: Town Clerk/Treasurer

Summary of Recommendations:

- Budget for Training a new Clerk – 6 months
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2. Purpose of Report

The purpose of this report is to provide Council with a clear understanding of current staffing levels and to assess the potential impact of employee retirements over the next five years. This report is intended to support informed decision-making regarding succession planning, workforce sustainability, and service continuity.

3. Current Workforce Profile

The table below outlines the Town's current staffing structure.

| Department | Total Staff | Full-Time | Part-Time | Casual | Avg. Years of Service | Avg. Age |
|----------------|-------------|-----------|-----------|--------|-----------------------|----------|
| Administration | 2 | 2 | | | 15.5 | 61 |
| Public Works | 3 | 2 | 1 | | 16.5 | 55 |
| Recreation | 0 | | | | | |
| Other | 1 | | 1 | | | 37 |

4. Retirement Eligibility Analysis

For the purposes of this report, retirement eligibility is defined as employees aged 65 or older.

| Department | Eligible Now | Eligible in 1 Year | Eligible in 3 Years | Eligible in 5 Years |
|----------------|--------------|--------------------|---------------------|---------------------|
| Administration | 1 | | | |
| Public Works | 1 | | 1 | |
| Recreation | | | | |
| Other | | | | |

5. High-Risk Positions

The following positions have been identified as high-risk due to proximity to retirement and the critical nature of the role.

| Position Title | Estimated Years to Retirement | Note |
|----------------|-------------------------------|-----------------|
| Town Clerk | 1 | Risk Level s100 |

Risk considerations include:

- Specialized knowledge or certifications
- Leadership or supervisory responsibilities
- Difficulty in recruitment or training

6. Retirement Impact Analysis

Anticipated retirements may have the following impacts on municipal operations:

- Loss of institutional knowledge and experience
- Potential disruptions to service delivery
- Increased workload for remaining staff
- Recruitment and training requirements for staff

Proactive planning will be required to mitigate these impacts and maintain service levels.

7. Succession Planning & Mitigation Strategies

To address the identified risks, the following strategies are recommended:

- Cross-training employees to build internal capacity
 - Establishing mentorship and knowledge transfer programs
 - Documenting key processes and procedures
 - Implementing phased retirement options where feasible
 - Developing recruitment timelines for critical roles
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8. Workforce Projections (3–5 Years)

| Year | Expected Retirements | Anticipated Hires | Net Staffing Change |
|------|----------------------|-------------------|---------------------|
| 2026 | | | |
| 2027 | 1 possibly 2 | 1 or 2 | |
| 2028 | | | |
| 2029 | | | |
| 2030 | | | |

9. Financial Considerations

The financial implications associated with workforce changes may include:

- Retirement payouts (vacation, benefits, etc.)
- Recruitment and onboarding costs
- Training and development expenses
- Potential operational savings through restructuring (if applicable)

10. Recommendations

Based on the findings of this report, the following actions are recommended:

1. Develop formal succession plans for all high-risk positions
 2. Initiate early recruitment strategies for critical roles
 3. Allocate resources for staff training and development
 4. Review organizational structure to ensure efficiency and sustainability
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11. Conclusion

The Town of Lockeport is experiencing an anticipated shift in workforce demographics due to upcoming retirements. Proactive planning and strategic workforce management will be essential to maintaining service delivery standards and organizational stability.

Council's consideration and support of the recommendations outlined in this report will help ensure a smooth transition and continued operational effectiveness.

Respectfully Submitted,

June Harding

Town Clerk/Treasurer