



A LONG AND PROUD HISTORY

THE CARLETON
PLACE AND DISTRICT
CHAMBER OF
COMMERCE

OUR 2020 VISION:

Vision, Leadership, Action

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Message from the Chair



Turning 100 years of age is a significant milestone! In 2016, the Carleton Place and District Chamber of Commerce celebrated its Centennial and is well positioned for the next 100 years.

While we may be starting all the celebrations, we are not alone in reaching milestones. On July 1, 2017, Canada will celebrate 150 years, since Confederation. In 2018, we will recognize that 100 years ago, one of our very own, Roy Brown, shot down the Red Baron, near the end of

WWI. Finally, in 2019 the Town of Carleton Place will be 200 years young!! There is just so much to be proud of and to celebrate!

Although I haven't been part of the first 90 years of the history of the Carleton Place and District Chamber of Commerce, I can speak to the last 10 as being very rich in community work.

Many Chambers of Commerce/Boards of Trade in smaller communities experience a cycle of productivity and inactivity throughout their history. Much depends on the Board elected to steer the activities of the organization and I am very proud to say that I have been honoured to work with many leading individuals who deserve so much credit for the successes of our Chamber of Commerce today.

As we reflect on the last 10 years, we can see initiatives that struggled to succeed and initiatives that have been tremendously successful. The high calibre of professional talent that drives this organization is dedicated to the success of business in Carleton Place and district and these business owners/operators commit countless hours of precious time to promoting a healthy and prosperous business climate.

I am delighted to report that the Board of 2016/2017 has worked to re-write the Strategic Plan for our Chamber, which describes an action plan based on goals for the future, and exciting initiatives we have been building on for the last few years. Our vision for the future is a renewed commitment of the Chamber to provide increased support to new and existing businesses in many ways including events, partnerships, collaboration with other community groups, and a concerted effort to attract and retain new residents and businesses to our community.

'If we build it, they will come'.

A familiar phrase to many, but also one that demonstrates the attitude of leadership of our new Strategic Plan. If we work collaboratively to build a business community where people believe it is a 'Nice place to visit and a great place to call home', our community will grow and prosper.

According to the 2016 Census, Carleton Place grew by 8.1%. Our community is poised to continue this growth with our current 3400 residential dwellings potentially growing by the currently-approved 3000 residential lots about to be sold.

We have watched the membership of the Carleton Place and District Chamber of Commerce grow 260% in 10 years as more and more business owners realize the direct correlation of success in business and a Chamber membership. Monthly Networking Breakfasts with professional development themes, regular evening Mixers to promote and support members, Economic Development activities, moulding and encouraging young entrepreneurs, as well as our long-standing commitment to local tourism and so much more on our agenda moving forward.

The next 100 years will be, I have no doubt, as exciting and productive as the first 100 and I feel blessed to have been part of a small piece of this history.

I am grateful to the business community for allowing me the opportunity to lead this incredible organization and, as always, encourage all business owners/operators to get involved in this fulfilling and worthwhile cause.

A handwritten signature in black ink, appearing to read "L.M. Donald". The signature is written in a cursive style with a large, sweeping initial "L" and "M".

Strategic Plan Overview

The Carleton Place and District Chamber of Commerce strategic plan for the three years approaching 2020 seeks to enhance the Chamber membership experience, increase and improve public perception and awareness of the Chamber, build strong community relationships, demonstrate leadership in shaping the business landscape and increase revenues to strengthen and grow the Chamber.

Background

A Chamber of Commerce is the vehicle that enables people to work together to improve business - to build a better community and to develop better citizenship in the community, the province and the nation. Although the local community is a market in which business compete for customers, the common intention of the business leaders is to grow and improve this common market. Their Chamber is the means through which they can work together to achieve this goal.

The Carleton Place & District Chamber of Commerce was incorporated as the Carleton Place Board of Trade on January 24th, 1916. In the last hundred years the organization has changed and grown along with the community it represents.

Records show that the Carleton Place Board of Trade was started by 24 local merchants. In June 1970, the Carleton Place Board of Trade officially changed its name to The Carleton Place Chamber of Commerce. Today our Chamber boasts over 240 members that represent the community in all sectors.

The Carleton Place & District Chamber of Commerce has established six working committees to carry out its Strategic Plan. Each has a specific mandate, expressing the Chamber's role in business advocacy, delivery of tourism services, engagement and relationship building among the membership, cultivating a business friendly culture within the community and demonstrating leadership in community economic development.

What sets our Strategic Plan apart from all the other Chambers, who documents we have reviewed, is our Chamber's commitment to Community Economic Development.

In many municipalities, economic development is a portfolio of local government. Recognizing the potential for business and social growth in Carleton Place, over the next five years, the Chamber recognizes the opportunity to complement a formal municipal economic development strategy.

In addition to committees charged with governance, membership services and tourism, the Chamber has established two working groups to address community economic development and the cultivation of a small business support network.

This reflects the Chamber's view of its role as an advocate for its business members' and its responsibility to demonstrate vision, leadership and action, as a driver of community economic growth and prosperity.

Execution of these goals depends heavily on the personal commitment of each member of the board of directors, the working committees and the Chamber membership. It is vital that all read, understand and endorse the Strategic Plan.

Three keywords describe the Chamber's Strategic Plan: Vision, Leadership, Action

Our Committees

Executive Committee:

The Chair, Vice-Chairs and Treasurer form the Executive Committee which works closely with Chamber staff, providing expertise and support in the conduct of Chamber business.

Strategic Planning and Policy Committee:

The Strategic Planning & Policy Committee, selected from the Board of Directors, develops and oversees the deployment of the Chamber's strategy & currency of its policies fulfilling its mandate for advocacy, delivery of member services and community growth and activism.

Member Retention, Engagement and Access Committee:

Convening events that present opportunities for members to grow their business and personal networks, connect with the community and share information. Growing the membership through outreach to new business and retaining existing members by building value is the key focus.

Tourism Committee:

Working with other stakeholders, the Town of Carleton Place, Downtown Carleton Place (BIA) and Lanark County Tourism, promote Carleton Place as a destination for visitors and prospective residents. Deliver tourism services on behalf of the Town of Carleton Place, and create an annual Community and Visitor Information Guide.

Advocacy, Investment and Mentorship Committee (AIM):

Advocacy, Investment and Mentorship are available to new and existing businesses, as a support system, to build long-term business success. Through its College of Mentors and Junior Achievement instructor team, the AIM committee is committed to building a business-friendly, business-literate community.

Community Growth and Development Committee (CG & D):

Actively working to promote Carleton Place as a community, stimulate local businesses and foster economic growth by attracting new residents and businesses.

Our Mission

The Carleton Place Chamber of Commerce exists to create and maintain a positive business climate in collaboration with local government bodies. We exist to encourage and foster free enterprise and economic development and promote tourism.

- To help build the economy of Carleton Place and District.
- To serve as the “Voice of Business” in our community and the surrounding area.
- To facilitate business and social contact among members of the Carleton Place and District Chamber of Commerce and develop and maintain useful programs and services for membership.
- To communicate information on topical subjects of interest to the membership.
- To promote a society and economy based on private enterprise and concern for the individual.
- To work in concert with local development organizations in the creation, implementation and monitoring of an economic development strategy.
- To implement a tourism strategy in collaboration with key stakeholders and to promote Carleton place as a nice place to visit and a great place to call home.
- To ensure the retention, involvement and growth of the Carleton Place and District Chamber of Commerce’s membership.
- To enhance the image of the Carleton Place and District Chamber of Commerce by providing outstanding leadership for its members.
- To enhance involvement with the Canadian and Ontario Chamber of Commerce

Strategic Plan Guiding Principles

The Chamber of Commerce is committed to developing and implementing a strategic plan that is:

1. **Strategic**
 - » Has a long-term focus and is renewed annually, based on significant input and feedback from business and community stakeholders;
2. **Integrated**
 - » Reflects 'best practice' recognition that tourism, economic development, marketing and promotions all inter-relate in sustaining and growing small towns
3. **Formally Planned**
 - » Uses a transparent, process-driven approach to developing and prioritizing actions and accountabilities
4. **Supported**
 - » Consideration is given to ensuring that there are the necessary experience and expertise in addition to the financial support required to start and keep up any initiatives
5. **Evaluated**
 - » Formal and transparent process is put in place so that all stakeholders are able to see the results of activity associated with the Chamber of Commerce strategic plan
6. **Dedicated Resources**
 - » Staff, volunteers, management board/directors with expertise and experience critical to undertaking both development and implementation of the Strategic Plan
7. **Consolidates Effort**
 - » Brings together under one 'roof', with a single focus, without competing agendas, all the stakeholders with an interest in tourism and economic development
8. **Maximizes Return on Investment**
 - » Unique ability to dedicate both volunteer and paid expertise and constant staff attention to the task of strategically planning and leading initiatives designed to create 'conditions for success' for local businesses
9. **Trusted by both business and other community stakeholders**
 - » The Chamber is uniquely positioned as being a 'neutral party', dedicated to the well-being of all businesses in CP and by extension, the community as a whole
10. **Forum for community collaboration**
 - » The Chamber has made significant strides recently in building its membership and renewing its relationship with the community at large

Organization Chart

Carleton Place Chamber of Commerce Committee Mission and Structure: 2017							
Committee	Member Engagement, Retention and Access	Tourism	Advocacy, Investment, Mentorship	Community Growth and Development	Strategic Planning and Policy	Executive Committee	
Description	Work to enrich the value of Chamber membership through programming, events and services	Promote tourism; provide tourism services to visitors on behalf of the Town of Carleton Place	Cultivate growth and retention of local business; Promote financial and business literacy	To promote Carleton Place as a community, stimulate local businesses and foster economic growth by attracting new residents and businesses.	Formulate and direct the plan and develop appropriate Chamber policy documents	Provide expertise and support in the conduct of Chamber business	
Mission	Affirm value of Chamber membership develop programming that adds value	Establish Carleton Place as a popular tourist destination promote tourism assets	Build a business-literate, business-friendly culture in Carleton Place-Beckwith	Community Economic Development	Visualize, plan and execute the mission and values of the Chamber	Work with staff in dealing with administrative, financial and personnel matters	
Action & Events	Ambassador Program - membership recruitment, retention	High level management and operation of Information Centre	School Visits	Marketing on web site	Review Strategic Plan annually to benchmark and update		
	Ribbon cutting, anniversary program development	Produce annual Information guide	Business @ Breakfast	Property Directory	Ongoing development of policy documents for Chamber		
	Develop networking and training opportunities ie) Business at Breakfast, workshops, Movers and Shakers	Participate in community events that attract Tourism	Meet the CEO	Information meetings	Ensure website and promotional documents reflect values and mission of Chamber	Liase with staff on a regular basis to ensure best practices in Chamber management are being developed and considered	
	Develop special events that programs that showcase businesses ie) Business Awards	Develop collateral material for Carleton Place	Junior Achievement	Development of community welcome package to be used by builders, real estate and Welcome Wagon			
Stakeholders	Golf Tournament	Liase with tourism stakeholders locally and throughout county	Mentorship				
	Chamber Members	Develop products and programming that will grow tourism	Business Forums				
	Chamber Members	Chamber Town of Carleton Place Beckwith Township Lanark Tourism BIA	Chamber Members Canada Career Centre Schools JA Ottawa	Chamber Members Builders & Developers Town of Carleton Place CAF	Chamber Members Town of Carleton Place BIA	Chamber Board	
Chairs & Members	2nd Vice Chair	Board Member	Board Member Co-Chairs	Board Member	1st Vice Chair	Chair	
		Chamber Manager				Vice-Chairs	
		BIA Rep.				Treasurer	
Direct Report		Town Rep.				General Manager	
	Chamber Board	Lanark Tourism Rep. Chamber Board	Chamber Board	Chamber Board	Chamber Board	Chamber Board	Chamber Board

Our Strategic Plan

Our 2020 Strategic Plan is Built on Six Key Elements:

I. EXECUTIVE COMMITTEE

The Executive Committee will provide high level financial management, be involved in budget processes, and provide general oversight for the management of the Chamber with a goal of building membership and increasing revenue sources through dependable mission-related revenue.

Purpose: Acting on behalf of the Board, the executive committee, comprised of the Chair, first and second Vice Chairs, the Treasurer, and General Manager, (to advise on day-to-day Chamber business), within the chamber policy and procedures framework and makes recommendations to the board, where necessary.

Background: The Executive Committee can more readily assemble to deal with routine matters which fall within established Chamber policy and practices. Where existing policies and procedures need to be interpreted, modified or changed, the Executive Committee will make appropriate recommendations to the Board for consideration and action.

The Executive Committee will ensure the Chamber is well represented at events, functions and presentations, reflecting the aspirations of all Chamber members.

Initiatives:

- The Executive Committee will continually look beyond current administrative practices and policies to devise new, more efficient or more reliable approaches to the conduct of Chamber business, bringing forward recommendations to the Board, where procedural or by-law changes are indicated.

Objectives:

- ✓ Monitor and ensure high level financial management processes being used
- ✓ Ongoing review and update of cash management policies and processes
- ✓ Work to Identify and implement new income sources and revenue streams
- ✓ Develop and promote group insurance program

2. STRATEGIC PLANNING, POLICY AND FINANCE

The Strategic Planning Committee will develop and executes the Chamber's business plan, fulfilling its mandate for advocacy, delivery of member services and community activism.

Purpose: The Strategic Planning, Policy and Finance committee is responsible for Annual Budgets and Planning, including membership of the Board of Directors, Government Affairs, Chamber Constitution and Bylaw review and defining immediate and long term objectives in its Strategic Plan. They will regularly review and work to implement new policies that are in keeping with the Chamber objectives.

Background: At the core of its Strategic Plan are the Chamber's goals of small business advocacy and exceptional service to its members.

Initiatives:

- Execution of the Strategic Plan through committee work.
- Continued oversight and development of working policy as it becomes relevant.
- Works to identify and support advocacy work when appropriate, locally, and work with Ontario and Canadian Chambers to educate locally about programming and advocacy work done provincially and nationally.

Objectives:

- ✓ Create policy documents that comply with the general governance principles of the Chamber
- ✓ Review and update the Chamber Strategic Plan and other documents on an annual basis
- ✓ Create policy that supports good business practises in Carleton Place and District
- ✓ Liaise with local governments to ensure that Chamber policies align with their Strategic Goals

3. MEMBER ENGAGEMENT, RETENTION & ACCESS TO SERVICE

Convene events that present opportunities for members to grow their business and personal networks, connect with the community and share information. Growing the membership through outreach to new businesses and retaining existing members by building value.

Purpose: To identify and prioritize member service enhancements, member recruitment strategies and recommend membership retention considerations. To determine best practices for welcoming new members, ensuring membership engagement and optimization of sponsorship strategies and opportunities. To coordinate and develop member events and activities that promote member interaction, collaboration and co-operation.

Background: This committee evaluates and makes recommendations on best practices to enrich the member experience, to optimize member engagement and retention and to encourage collaboration with member businesses. This includes oversight of events and activities, development of new programming, promotion of Chamber, raising the visibility of the Chamber in the community, raising the visibility of Chamber members and their events.

Initiatives:

- Chamber Ambassadors: this committee has been working to develop a robust Chamber ambassador program that would actively engage and attend in community events, take part in ribbon cutting and anniversary celebrations for Chamber members and take part in welcoming new businesses to the community. Ambassadors will call on businesses in the community, reaching out to prospective members and reaffirming engagement with existing members.
- Chamber Events: this committee is the oversight committee for all Chamber events including Business at Breakfast, Chamber Golf Classic, Business Awards of Excellence Gala and Seminar and Professional development. Events are executed to provide optimal opportunities for member businesses to develop relationships with other Chamber members, learn about collaborative opportunities, promote their business offerings and recognize and celebrate their successes.
- Program Development: this committee is the sounding board for new programming initiatives such as the M2M discount program, Affinity Programs, the development of the 12 @12 Business Series, the development of projects and initiatives that provide promotional opportunities for the Chamber, community groups and member organizations.

Objectives:

- ✓ Be proactive in demonstrating members' successes
- ✓ Explore new ways to help promote members' businesses

- ✓ Promote the chamber website as the place to comment and learn
- ✓ Initiate more two way communications and surveys to solicit feedback
- ✓ Maximize opportunities in m2m discount programs and referral programs
- ✓ Identify sustainable ways to meet member needs through surveys, regular communications, training, conferences, information and referral
- ✓ Implement standard practices for cancellations including exit survey, letter and call from executive
- ✓ Identify and implement targeted campaigns/contests to drive revenue
- ✓ Touch 100% of new businesses
- ✓ Ensure value and access including scholarships
- ✓ Add a member's only section on website with a searchable online resource database

4. TOURISM

Working with other stakeholders, the Town of Carleton Place, Downtown Carleton Place (BIA) and Lanark County Tourism, promote Carleton Place as a destination for visitors and prospective residents. Deliver tourism services on behalf of the Town of Carleton Place, through the Information Centre, 170 Bridge Street.

Purpose: The tourism team is a group of volunteers and staff representing the public and private sectors in Carleton Place. Our economic well-being is largely dependent on a healthy tourism industry. To provide a rich travel experience for our visitors and in doing so cultivate a dynamic tourism industry by working together cooperatively, coordinating activities and sharing resources.

Background: Given the dramatic increase in families wanting a more local, short term vacation experience, the abundance of ecotourism opportunities and the shopping and cultural and recreation venues available in Carleton Place, a cohesive, cooperative and targeted tourism campaign was considered by many to be critical to the health of our community. The Carleton Place Chamber has initiated a forum of the key stakeholders to discuss and develop this campaign. The Carleton Place Tourism team was formed as a result of the need for a tourism strategy as identified in the town's strategic plan.

Initiatives:

- Production of the Carleton Place Visitor Information Guide annually.
- Identify opportunities to source and develop local CP branded Merchandise or artisan merchandise for sale in the gift shop
- Membership participation with tourism organizations at all levels – board of directors, Lanark County Tourism Association, member and collaborative partner with Ontario Highland Tourism Organization
- Delivery of programming geared at customer service standards, customer service training and staff training.
- Creation of a bi annual Familiarization Tour for local business owners and stakeholders
- Apply for grants when possible to hire students with a role to assist in delivery of tourism offerings and new projects

Objectives:

- ✓ High level management of Information Centre
- ✓ Continue to Create comprehensive tourism guide
- ✓ Involvement and support of local events
- ✓ Maintain calendar of community events
- ✓ Help manage joint marketing of initiatives
- ✓ Liaise with local and regional tourism partners
- ✓ Provide training opportunities for local business owners to ensure high levels of customer service and satisfaction

5. ADVOCACY, INVESTMENT AND MENTORSHIP (AIM)

The Chamber of Commerce will continue to work with all levels of government for the betterment of the community. As the “Voice of Commerce”, our advocacy will impact and influence stakeholders and policy makers. Advocacy, Investment and Mentorship are available to new and existing businesses, as a support system, to build long-term business success. Through its College of Mentors and Junior Achievement instructor team, the AIM committee is committed to building a business-friendly, business-literate community.

- ✓ Provide familiarization opportunities for local business owners to support each other

Purpose: A 2014 member survey called upon the Chamber to create a more business-friendly climate in Carleton Place. The response is AIM, an acronym comprising three elements for small business success:

- » **Advocacy:** The Carleton Place Chamber of Commerce advocates for small business; the heartbeat of our community. AIM advocates for business literacy in our young people, demonstrating opportunities for success, while remaining and contributing to their home community. AIM advocates for community development, built on a small business foundation, as the driver of jobs and prosperity.
- » **Investment:** The AIM Project brings new and existing businesses together with sources of capital, to ensure a successful outcome. Successful businesses pay dividends, create jobs and provide essential goods and services for our community.
- » **Mentorship:** Behind every successful business is a talented, hard-working entrepreneur. Over the lifetime of every business, the challenges of competition, changes in markets or financial reverses will stretch the resources of the entrepreneur. A helping hand from an individual or a group of mentors can help the enterprise to weather the storm, positioning it for sustained success.

Background: AIM is an initiative launched by the Carleton Place Chamber of Commerce to create a fertile environment for the development of new businesses in Carleton Place-Beckwith and to provide a pool of tools and talent to help existing businesses grow and prosper. AIM seeks to build a greater awareness of the role of small business in the community; as employers, as corporate citizens and as drivers of growth and prosperity for Carleton Place-Beckwith. Harnessing the wealth of talent and experience of the Chamber membership, AIM applies this resource to building a strong, self-reliant business community and a developing generation of entrepreneurs and community builders.

Initiatives:

- Through its College of Mentors, AIM works with would-be entrepreneurs to launch new businesses. AIM also works with existing businesses to lever their skills and experience, assuring their continued success. AIM works with students to demonstrate the value of initiative, imagination and entrepreneurship, enabling them to build their future here, in their home community. The AIM message, through young entrepreneurs, demonstrates to their parents and to the wider community that successful small business enterprise is the key to civic pride.

- AIM works collaboratively with Chamber member-volunteers who serve as mentors and instructors, with the Canada Career Centre, Downtown Carleton Place merchants, the Small Business Advisory Centre, our local schools and the Ottawa Network for Education in delivering Junior Achievement programs.

Objectives:

- ✓ Take stand on positions locally, provincially and nationally
- ✓ Strengthen partnerships with other chambers on regional issues
- ✓ Meet with elected official on a regular basis – all levels of government
- ✓ Become more responsive on issues
- ✓ Identify needs of members and kinds of advocacy they would like to see; improve communications with clear focused messaging and repeat
- ✓ Provide mentorship for local businesses
- ✓ Provide mentorship and training in financial literacy for local students
- ✓ Provide learning opportunities to local students through program delivery at high schools

6. COMMUNITY GROWTH AND DEVELOPMENT

The Chamber will advocate for the improvement and promotion of industry, trade, commerce and the economic growth of the district. Leading the quest for new businesses and new citizens of Carleton Place and District, the Community Growth and Development Committee is working to raise awareness of Carleton Place in the National Capital Region.

Purpose: To promote Carleton Place as a community, stimulate local businesses and foster economic growth by attracting new residents and businesses.

Background: The Community Growth and Development Committee began as a Chamber of Commerce initiative to attract, as prospective residents, serving military and civilian employees of the Department of National Defense (DND), who are being transferred to the new headquarters at 3500 Carling Avenue.

In 2015, the committee raised \$40,000., contributed by the Town of Carleton Place and local business leaders, to mount an advertising and public relations campaign, creating awareness of the benefits of living in Carleton Place. Through interaction with DND senior command and personnel, the committee defined its target market and better defined Carleton Place as “a nice place to visit and a great place to call home”.

In its first year, the Committee broadened its scope to include Community Economic Development, addressing the needs of the community in terms of its attractiveness to new residents and businesses and its readiness to grow; providing jobs and prosperity.

Initiatives:

- The Committee will lead a marketing and public relations campaign directed at prospective residents and businesses, coordinating with the town administration and local business leaders, to identify Carleton Place as an attractive destination.
- The campaign will include updates in the Town’s web site, focusing on prospective new residents and businesses, including a directory of current commercial properties available for lease or development.
- The Committee will work with firms who are considering the establishment of a business in Carleton Place, helping to facilitate their due diligence and planning. Working with the AIM Committee, CD&G will keep existing businesses apprised of developments and resources available to help them grow and adapt to change.
- The Committee will keep businesses and the community informed of events and developments through information forums, held at regular intervals

Objectives:

- ✓ Review and make suggestions to the Town on how best to market the town with Economic Development in mind
- ✓ Hold an Annual Information Night to update Chamber members on local Economic Development

- ✓ Provide a point of contact for members and local governing bodies regarding Economic Development
- ✓ Identify and pursue businesses or industries that would complement our local business mix and add to our local economy
- ✓ Research and share best practices in economic development with our membership
- ✓ Continue our work with attracting military / government families to Carleton Place
- ✓ Support new home builders and their efforts to grow our residential base

Conclusion

This strategic plan sets the course for growth and opportunity. As we head into the future we must always be asking ourselves, “how we can be better?”.

Each strategic goal expresses the actions required to get us to the next step. As the plan sets out the strategic goals and objectives, we will continue to strive for the achievement of these goals.

Achievement will rest on the efforts of our Board, committees, task forces and administrative staff.

Critical to this process is the ongoing commitment and involvement of our members whose participation and feedback are essential.