

Council Memo



To	City Council
Service Area	Office of the Chief Administrative Officer
Date	Tuesday, January 24, 2023
Subject	Strategic Plan Refresh: Workshop with City Council #1

This memo provides an overview of the agenda for the January 24, 2023 Strategic Plan Refresh: Workshop with City Council #1. This workshop will be an opportunity for Council to provide input in shaping the organizational strengths, weaknesses, opportunities, and threats (SWOT), strategic pillars, and initial draft of strategic objectives.

This workshop will also be an opportunity to outline Council's role in the strategic plan refresh process, and explain how the strategic plan will guide and inform the City's multi-year budget planning process.

Due to scheduling of the Council interviews in early January 2023, interview results, needed for the workshop, will be included on the Clerk's Office revised agenda for this workshop on January 20, 2023.

Workshop agenda

- Introduction and workshop objectives (5 minutes)
- Why we do strategic planning (15 minutes)
- SWOT exercise (30 minutes)
- Strategic objective setting (65 minutes)
- Next steps (5 minutes)

Introduction and workshop objectives

The purpose of this workshop will be to:

- Reaffirm the importance of the strategic plan, Council's role in the process, and how the strategic plan ties into the City's multi-year budget planning;
- Gather Council's input on the City's current state and organizational SWOT;
- Review the current strategic pillars and their accompanying goal statements regarding its continued resonance; and
- Validate and update the initial draft strategic objectives to reflect Council's priorities and direction for 2024-2027.

By the end of this workshop, the project team will have Council's input and feedback to develop a revised draft of the organizational SWOT, and the City's strategic pillars and objectives.

Why we do strategic planning

Strategic planning is a process in which the organization's leadership define their vision for the future and identify the organization's objectives and initiatives needed to achieve that vision. The key deliverable of this process is a strategic plan that communicates those objectives to guide the organization. The strategic plan will be funded by decisions made during the multi-year budget process.

What are we doing?

In September 2022, the City began work on the City of Guelph Strategic Plan Refresh 2024-2027 project. The goal of the project is to refresh the City's current corporate strategic plan for 2024-2027 and have it presented for approval by Council in July 2023. The City is undertaking this refresh to ensure the organization is heading in the right direction to be future focused.

Once completed, the refreshed strategic plan will inform and guide the actions of the City for 2024-2027. It will also inform the City's multi-year budget planning process, beginning in the middle of 2023.

Where are we in the refresh journey?

The strategic plan refresh is divided into eight (8) phases each with unique deliverables developed in the strategic planning process. Each phase's deliverables build on each other, culminating into the City's corporate strategic plan for 2024-2027. The eight (8) phases and their anticipated dates are as follows:

- Phase 1: Current State – Jul. 2022 to Jan. 2023
- Phase 2: Reconfirming – Nov. 2022 to Feb. 2023
- Phase 3: Strategic Objective Setting – Dec. 2022 to Mar. 2023
- Phase 4: Initiatives and Measurement – Jan. to Mar. 2023
- Phase 5: Document Creation – Mar. to Apr. 2023
- Phase 6: Reviewing – Apr. to Jun. 2023
- Phase 7: Adopting – Apr. to Aug. 2023
- Phase 8: Launch – Jan. to Dec. 2023

The January 2023 Council interviews are part of Phase 1: Current State. Phase 1 is about defining Guelph's current state, confirming outstanding City commitments, and identifying key external trends and issues.

The January 24 Council workshop is part of Phases 2 (Reconfirming) and 3 (Strategic Objective Setting). Phase 2 is about reviewing Guelph's current state and developing the organizational SWOT. Phase 3 is about developing the organization's strategic pillars and objectives.

What is Council's role in this process?

As the governing and key decision-making body for the City of Guelph and its municipal administration, Council's role is to guide and set the Corporation's strategic direction with City staff implementing that direction.

The strategic plan is a key tool for Council to communicate its priorities and direction across the organization for City staff to plan, resource, action, measure, and report.

The new strategic plan will be an input for Council's multi-year budget process in 2023.

Why is a strategic plan so important?

The City's strategic plan is the organization's North Star. It is a key tool for how Council's priorities and direction are communicated across the organization. The plan guides each department's work, which in turn helps guide departmental multi-year budget planning and individual work plans.

Overall, while the strategic plan sets the direction and priorities for the organization, the budget determines the pace of how quickly the organization can action and achieve the objectives and initiatives of the plan.

The City's budget is organized by the strategic plan's five (5) pillars and is developed from the plan's strategic objectives and initiatives. The budget is further guided by the official plan and master plans. However, while the strategic plan guides and informs the budget, the budget is also influenced by base-level service obligations that the City must deliver on each day.

Both the strategic plan and the multi-year budget are part of the strategic planning cycle—a best practice for municipalities. By taking a long-range approach to both strategic and multi-year budget planning, the organization can manage budgetary pressures so that City staff can better achieve strategic objectives while also maximizing budget dollars.

What are SMART strategic objectives?

SMART is an acronym that stands for Specific, Measurable, Attainable, Relevant, and Time-bound. SMART objectives are used in the strategic planning process to develop robust strategic objectives that are realistic, achievable, and can be completed within a predefined time frame. The SMART acronym is described as follows:

- **Specific:** The objective provides a clear description of what needs to be accomplished.
- **Measurable:** The objective can be measured to inform decision-making and report on success.
- **Attainable:** The objective is achievable and uses available resources while also respecting staff pace and capacity.
- **Relevant:** The objective aligns with community, council, and corporate priorities.

- **Time-bound:** The objective can be concluded within a predefined timeframe (i.e., 2024-2027).

By developing strategic objectives that are SMART (Specific, Measurable, Attainable, Relevant, and Time-bound) the organization will be better positioned to implement the strategic plan, achieve its goals, and realize its outcomes (i.e., addressing the existing and future needs of the Guelph community).

SWOT exercise

The first part of the workshop will have Council members undertake a SWOT exercise to review, discuss, and validate the City's strengths, weaknesses, opportunities, and threats. A SWOT is a widely used tool in strategic planning. A SWOT helps organizations analyze their current state and position themselves for the future.

Overall, the goal of this exercise is to build consensus with Council on the City's current state, as well as identify key opportunities and threats that should be considered in the refreshed strategic plan. This exercise will be building upon the work previously undertaken by Executive Team (ET) and Corporate Management Team (CMT).

Strategic objective setting

For the second part of the workshop, Council members will review the current strategic pillars and their accompanying goal statements to gather feedback on the framework. Afterwards, working through each of the five (5) pillars, Council will review, discuss, and update an initial draft of strategic objectives, building upon the work undertaken by ET and CMT in December 2022.

As Council completes this exercise, please consider these discussions points:

- What has the City already committed to that needs to stay?
- What opportunities and/or threats does the City need to address?
- What are the outcomes of these strategic objectives?
- Does the City have the resources (i.e., funding and/or staff capacity) to accomplish this objective? Can it be completed in 4 years?

Next steps

With the conclusion of this workshop, the project team will incorporate Council's input and direction to develop a revised draft for the organization SWOT and City's strategic pillars and objectives. The next workshop session has been scheduled for February 22, 2023.

Council's ongoing involvement in these workshops, and throughout the strategic planning process, will be vital to ensuring the success of the refreshed strategic plan for 2024-2027.

Attachments

Attachment-1 Strategic Plan Refresh: Current State and Trends Report

Attachment-2 January 24, 2023 Council Workshop Presentation (to be provided on revised agenda)

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