

Council Memo



To	City Council
Service Area	Office of the Chief Administrative Officer
Date	Wednesday, February 22, 2023
Subject	Strategic Plan Refresh: Workshop with City Council #2

This memo provides an overview of the agenda for the February 22, 2023 Strategic Plan Refresh: Workshop with City Council #2. This workshop will be an opportunity for Council to provide input into refining the strategic pillars and objectives for the 2024-2027 strategic plan. Additionally, through the refresh process, Council will have further engagement opportunities to provide input on the refreshed strategic plan.

This workshop will also be an opportunity to continue the strategic planning process overview and reinforce how it guides the City's multi-year budget (MYB) planning process.

It is important to note that this year (2023) marks the last year of Guelph Future Ready's implementation by City staff, a transitional year between strategic plans. What is accomplished through Guelph Future Ready in 2023 will set the foundation for the refreshed strategic plan.

Due to scheduling of the workshops in late January and early February 2023, input from the Executive and Corporate Management Team workshops, needed for this workshop, will be included on the Clerk's Office revised agenda on February 17, 2023. The revised agenda will include the draft strategic pillars and objectives, as well as the workshop presentation.

Workshop agenda

- Introduction and workshop objectives (5 minutes)
- Strategic planning and multi-year budget planning (15 minutes)
- Strategic pillars and objectives review (1 hour 35 minutes)
- Next steps (5 minutes)

Note: All durations are approximate.

Introduction and workshop objectives

The purpose of this workshop will be to review and expand upon the draft strategic pillars and objectives, including draft goal statements.

By the end of this workshop, the project team will have Council's input and feedback to refine the City's strategic pillars and objectives. Thereafter, City staff

will be able to develop the accompanying strategic initiatives and key performance indicators (KPIs).

Strategic planning and multi-year budget planning

Strategic planning, as defined in the first Council workshop, is a process in which the organization's leadership define their vision for the future and identify the organization's objectives. Staff can use this to create initiatives to achieve that vision. The key deliverable of this process is a strategic plan that communicates those objectives to guide the organization.

Multi-year budget planning is a process that establishes a long-term financial plan for the organization to fund its operations, initiatives, and capital assets to achieve the organization's strategic plan and vision while maintaining operations and service levels. The key deliverable is a MYB that guides the organization's financial resources to support both the day-to-day operations and actioning the strategic plan.

Project status update

As of February 22, 2023, two (2) of the eight (8) phases of the strategic plan refresh project have been completed. The remaining phases and 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 – Jul. to Dec. 2023

The February 22, 2023 Council workshop is part of Phase 3: Strategic Objective Setting and will allow staff to refresh the organization's strategic pillars and objectives.

SMART strategic initiatives

Strategic initiatives are specific actions an organization undertakes to help it achieve the strategic plan's vision and objectives. Developing SMART strategic initiatives are important as they are realistic, achievable and can be completed within a defined time frame.

SMART stands for:

- **Specific** – The initiative provides a clear description of what needs to be accomplished.
- **Measurable** – The initiative can be measured to inform decision-making and report on success.

- **Attainable** – The initiative is achievable and uses available resources while also respecting staff pace and capacity.
- **Relevant** – The initiative aligns with Council, corporate, and community priorities.
- **Time-bound** – The initiative can be concluded within a defined timeframe (i.e., 2024-2027+).

Ensuring strategic objectives and initiatives are SMART will better position the organization to effectively achieve Council's priorities, execute the strategic plan, and realize desired outcomes. The outcomes should be addressing the existing and future needs of Guelph residents.

Strategic initiatives success factors

There are three (3) major factors why initiatives may not be achieved by an organization:

- **Lack of corporate alignment** – Without alignment to leadership's priorities, strategic initiatives can either become low priorities and remain unfinished, or the resources used do not create the desired outcome.
- **Split focus** – Splitting resources across too many priorities risk staff not having the required supports to achieve meaningful results.
- **Lack of accountability** – Not every new opportunity is relevant to the organization's goals. Disregarding the original plan for new opportunities means moving resources away from other initiatives. This impacts the initiatives' success and benefits.

In addition to developing SMART strategic initiatives, an organization is more successful in accomplishing initiatives when it has:

- **Corporate alignment** – They are aligned to the organization's top priorities;
- **Focus** – The organization can prioritize and focus limited staff and financial resources on a few great initiatives that can be effectively supported and achieved; and
- **Accountability** – The organization is committed to completing its initiatives to realize desired outcomes. Shifting to new opportunities should only be done when they stand to benefit strategic objectives and can be planned for by staff.

Note: When new opportunities cannot be undertaken by the organization, advocacy is an effective alternative to pursue.

Importance of the multi-year budget

The City's MYB and corporate strategic plan will be linked together in four-year planning cycles with 2024 to 2027 being the City's next cycle. As the strategic plan communicates what Council's priorities and direction are for the organization, the MYB will determine when the organization can implement it.

A MYB is an emerging municipal best practice, with Guelph being an early adopter. By taking a long-range approach to both strategic and MYB planning, the organization can align its long-term objectives with long-term funding plans to

improve organizational performance and maximize taxpayer dollars. This approach helps ensure budgetary pressures (e.g., inflation, economic factors, changing legislation, etc.) will be managed to secure the right resources at the right time.

The City's budget is organized by the strategic plan's five strategic pillars and is informed by the following:

- The corporate strategic plan's objectives and initiatives;
- The Official Plan and Master Plans (i.e., Transportation Master Plan, etc.);
- Base-level service obligations that the City must deliver; and
- Economic and inflationary factors and pressures.

As part of the strategic planning cycle, the MYB process will request Council to approve a four-year budget in late 2023 that will align with the refreshed strategic plan for 2024-2027. The budget is presented to Council to be readopted for every subsequent year of the approved MYB. The budget confirmation process, which asks Council to review, update, and confirm the budget in each of the years, is the City's mechanism for re adoption.

Overall, the budget is the City's affordability tool that determines the pace for staff to action the strategic plan. As the organization embarks on this refresh, focus is given to carrying over existing City commitments to help ensure long-term objectives can be achieved.

Strategic pillars and objectives review

Council is the governing and key decision-making body for the City of Guelph and its municipal administration. One of Council's roles is to set the Corporation's strategic direction for City staff to implement. Those directions become the strategic plan's strategic pillars and objectives.

During the workshop, Council will review the updated pillars and objectives through a "plan on a page" strategy map, where the pillars can be viewed together. Council will also review and discuss the connections between each pillar.

Key discussion questions:

- If progress is made on all the objectives, would this realize Guelph's future vision?
- Would you feel successful in terms of the City's achievements over this term?
- Does this feel like a plan that is ambitious and impactful, but also realistic and implementable?

After this discussion, Council will review each pillar's goal statement and objectives. Council will also complete a cross-check exercise of each pillar to ensure overall consistency.

Key discussion questions:

- If we made progress on all the objectives, for each pillar, would the City's most pressing needs be met?
- Is there anything missing from these pillars?

- Using the SMART (Specific, Measurable, Attainable, Relevant, and Time-bound) framework for strategic objectives, do you feel progress can be made with these objectives over this term of Council?
- What do we need to think about as we determine how to implement and advance these objectives (e.g., resources, funding, systems, barriers, etc.)?

Next steps

With the conclusion of this workshop, the project team will incorporate Council's input and direction to refine the strategic pillars and objectives. This will establish a strong foundation for the development of strategic initiatives and key performance indicators in Phase 4: Initiatives and Measurement.

The next key engagement session will be scheduled for March 2023 to discuss the first draft of the refreshed strategic plan Phase 5: Document Creation. Council will also have further engagement opportunities to provide input and feedback on the refreshed strategic plan.

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

Attachments

Attachment-1 Strategic Plan Refresh: Draft Strategic Pillars and Objectives (to be provided on revised agenda)

Attachment-2 February 22, 2023 Council Workshop Presentation (to be provided on revised agenda)

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