

# Council Memo



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| To           | <b>City Council</b>                        |
| Service Area | Office of the Chief Administrative Officer |
| Date         | Tuesday, April 25, 2023                    |
| Subject      | <b>Strategic Plan Refresh Workshop #3</b>  |

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This memo provides an overview of the agenda for the April 25 Strategic Plan Refresh Workshop #3. This workshop will be an opportunity for Council to provide input toward the 2024-2027 strategic plan.

Staff will provide an overview of the strategic planning process, the reporting cycle and how it guides the City's multi-year budget (MYB) planning process.

The current draft of the new strategic plan, as well as the workshop presentation, will be included on the Clerk's Office revised agenda on April 21.

## **Workshop agenda**

- Introduction and workshop objectives
- The strategic planning process
- Review draft of the new strategic plan
- Next steps

## **Introduction and workshop objectives**

The purpose of this workshop will be to review the current draft of the new strategic plan with Council and build consensus on key issues to provide direction for City staff.

The strategic plan consists of strategic themes, objectives, initiatives and sub-initiatives and key performance indicators. Any initiative-level questions and/or input identified by Council before, during or after the workshop will be addressed by staff, outside of the workshop.

By the end of this workshop, the project team will have Council's input and feedback to revise the 2024-2027 strategic plan and work toward a final draft for Council approval at the Committee of the Whole meeting on July 5, 2023.

## **The strategic planning process**

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 then use this to create strategic initiatives and key performance indicators (KPIs) to action the goals of the plan and measure progress, respectively.

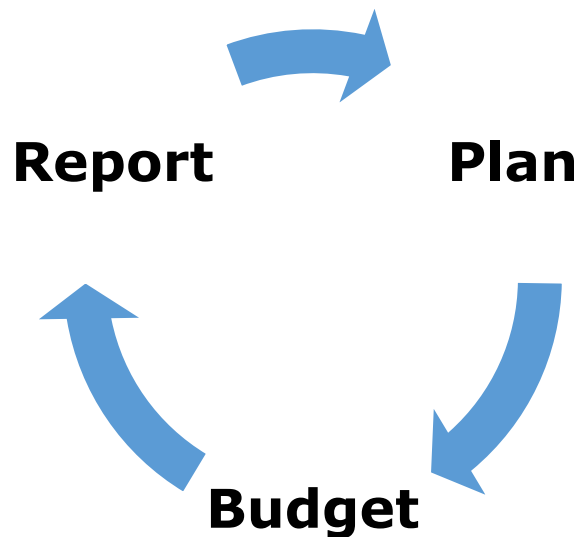
The main deliverable of this process is a strategic plan that communicates Council's objectives to the organization.

As the City progresses toward completing the strategic plan refresh in July 2023, the organization takes another step in the strategic planning cycle: plan, budget and report. Once report is complete, the cycle begins again at plan.

The City is currently on the first step of this cycle: plan. When completed, the organization moves onto the next step: budget, with the MYB planning process.

While the strategic plan and MYB are long-term plans (four-year spans), this cycle still occurs on an annual basis. Factors arise that bring change, this cycle helps organizations adapt to those changes.

Figure 1. Strategic Planning Cycle



As part of the first step of the strategic planning cycle, the City is refreshing its strategic plan. This plan becomes the organization's north star, the master plans are the road map, and multi-year budget is the gas pedal. While the organization plans for a long-term road trip, there can always be detours, roadblocks and pit stops that change things.

Ultimately, the strategic plan is a living document and is not set in stone. Above all, Council decides where the City goes and how fast.

### **Multi-year budget planning**

As the second step of the strategic planning cycle, the multi-year budget for the City is where the strategic plan and its initiatives are funded for implementation by staff. Council is the governing body who makes these funding decisions. These decisions set the pace and scope of implementation.

As mentioned in previous workshops, the City's MYB and corporate strategic plan are linked together in four-year planning cycles with 2024 to 2027 being the City's next cycle. 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 the use of taxpayer dollars.

As part of this process, staff developed high-level estimates for each initiative of the new strategic plan. These estimates are preliminary and will be more accurately defined during the MYB process with Council in Q4 2023.

Each initiative's estimated budget requirements are represented by dollar signs to indicate the scale of funding:

- \$ - up to \$500,000
- \$\$ - \$500,000 to \$5 million
- \$\$\$ - \$5 million to \$15 million
- \$\$\$\$ - \$15 million and up

These estimates incorporate a mix of funding sources and are not funded solely through taxpayer dollars. Furthermore, many initiatives also have Council-approved budgets. For example, to illustrate this mix of funding sources:

- The South End Community Centre project, initiative 2.1 under the City Building theme, is funded by both development charges and taxes. The project funding has been approved by Council and is underway.
- The Tree Planting Strategy, a sub-initiative for initiative 1.3 under the Environment theme, will be funded by a mix of grants, user fees (from tree removals, development fees, etc.) and taxes, while also will leveraging private sector support.
- For the Long-term Financial Planning Framework, initiative 4.1 under the Foundations theme, requires no funding and leverages existing staff resources.

As new funding sources are made available, such as grants and revenue generating opportunities, the mix of funding sources for these initiatives can change.

Ultimately, through the MYB process, Council has final approval of the strategic plan's budget and can decide which initiatives receive more, or less, budget. Furthermore, decisions and policies discussed by Council will continue to inform the strategic plan and budget. The strategic plan will set staff direction. The completion of the strategic plan does not mean the budget is formalized for 2024-2027.

## **Performance reporting**

For the third step of the cycle, KPIs are established during the strategic planning process to measure and report on progress related the strategic plan's outcomes.

For the City, on an annual basis, a strategic plan progress report is developed and presented to Council, highlighting the City's achievements from the previous year. As this is a transition year for the 2019-2023 strategic plan, where the plan is in its final year of implementation, the most recent report is the [Guelph. Future ready. 2021 progress report](#). The 2022 report is scheduled for release June 2023.

## Elements of the City's strategic plan

As part of the strategic plan's refresh process, the elements of the strategic plan have been simplified. The new strategic plan will be structured as follows:

- **Strategic theme** (formerly pillar): Links strategic objectives together in a concise manner through a high-level goal, such as "City Building" or "People and Economy." These themes support cross-departmental collaboration by connecting departments via strategic objectives rather than by service area.
- **Strategic objective**: An organization's goal critical to achieving the plan's vision.
- **Strategic initiative**: An action-oriented goal (i.e., project, action, etc.) that realizes the organization's goal, leading to a specific outcome.
- **Strategic sub-initiative**: A more specific, action-oriented goal under each strategic initiative. The sub-initiative(s) provide additional context for the initiative's actions.
- **Key performance indicator**: A quantifiable indicator measuring progress toward an organization's goal and/or outcome. Each strategic initiative has a key performance indicator.

## Review the Draft 2024-2027 Strategic Plan

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 themes and strategic objectives.

This section of the workshop is structured into two parts:

1. Council will be updated on the changes made to the strategic plan based on their extensive feedback from the previous two Council workshops.
2. Council will walk through the draft strategic plan. There will be discussion at the objective level for Council to have an idea of what the plan will include and where Council feedback has been incorporated.

There are four themes and thirteen objectives. The four themes are City Building, Environment, People and Economy, and Foundations. It is important to note that the City cannot successfully advance the three specific themes (City Building, Environment, People and Economy) without advancing its foundations: technology, people, processes, advocacy and IDEA (inclusion, diversity, equity and accessibility). For an illustration of the strategy at a glance, see slide 12 of the presentation.

Any initiative-level questions and/or input identified by Council before, during or after the workshop will be addressed by staff, outside of the workshop.

Note: As initiatives are approved by Council and KPIs can be developed, the strategic plan will be updated. The strategic plan is a living document and changes with the organization and external environment.

## **Next Steps**

With the conclusion of this workshop, the project team will incorporate Council's input and direction to revise the 2024-2027 strategic plan.

Thereafter, the project team will work with staff to consult key stakeholders on City's strategic direction for the next four years. This work will help the City ensure alignment between partners, supporting future opportunities for collaboration on shared goals. This work will also build on top of previous engagement undertaken by the City, including engagement work for the strategic initiatives in the current draft.

As the refresh process concludes, Council's involvement in these workshops, and throughout the City's strategic planning process, have been critical in refreshing the strategic plan. The final draft of the 2024-2027 strategic plan will be brought for Council's approval in the next few months.

## **Attachments**

Attachment-1 Strategic Plan Refresh: 2024-2027 Strategic Plan (to be provided on revised agenda)

Attachment-2 April 25, 2023 Council Workshop Presentation (to be provided on revised agenda)

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