

**Region of Waterloo**

**Chief Administrative Officer**

**Chief Communications and Strategy**

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**To:** Administration and Finance Committee

**Meeting Date:** December 6, 2022

**Report Title:** Strategic Plan 2023-2027

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**1. Recommendation**

That the Regional Municipality of Waterloo approve the approach, timeline and supporting principles for the development of the new Corporate Strategic Plan 2023-2027 as outlined in CAO-SPL-22-009, December 6, 2022.

**2. Purpose / Issue:**

To seek direction from Council on the approach, principles and schedule to create a new Corporate Strategic Plan 2023-2027.

**3. Strategic Plan:**

The creation of a new Corporate Strategic Plan 2023-2027 supports the Responsive and Engaging Public Service focus area. The initiative will create new priorities for the organization based on current and future community need and aspirations.

**4. Report Highlights:**

- The Region of Waterloo is in the final stage of its existing Corporate Strategic Plan 2019-2023.
- The coming year will be a year of transition for the organization as new Council, staff and community work together to create a new plan while closing out the existing one.
- Staff recommend that a new Corporate Strategic Plan 2023-2027 be developed and approved by end of July 2023. This is critical to ensure funds and resources are aligned appropriately to the new priorities quickly.
- Staff recommend a strategic planning approach that is future focused and includes extensive engagement with community, area municipalities and partners.

- The engagement approach includes key elements such as a Community Advisory Round table, a Youth Advisory Group and a Community Connector Outreach strategy. This will help support meaningful, equity-based dialogue, and the co-creation of priorities with the community.
- Staff have created draft process objectives and guiding principles that will support the development of the initiative for Council deliberation as follows:

### Core Objectives

- Explore and redefine our mission, vision and values.
- Set strategic priorities for the organization that will shape financial and resourcing decisions.
- Identify opportunities and challenges that the future might hold for Waterloo region.
- Encourage new thinking and be alert to changing forces and trends.
- Stress test our existing plans and strategies against different scenarios.
- Increase a sense of ownership in the Region's future path with Staff and stakeholders.
- Build accountability through a foundation of performance and evaluation (including KPIs and metrics).
- Increase resident engagement and awareness of how the Region impacts their lives every day and what it aims to achieve over the coming years.

### Guiding Principles

Based on engagement of close to 400 staff to date, the following draft principles have been created to shape the strategic planning process and functionality of the new strategy.

- **Show connections:** Strategic plan process to knit all the pieces together, build on existing plans and strategies
- **Build focus:** Strategy should guide prioritization
- **Find balance:** Existing vs new initiatives
- **Help clarify:** Our roles, mission & vision
- **Build strong partnerships and alliances:** Strategic connections to external partners which emphasize mutual benefit and build synergy to amplify results
- **Engage staff broadly:** Help them see themselves in the plan and values and leverage their lived experiences and identities to build the plan
- **Embed equity:** Centre the voices of those often not included
- **Build trust and credibility:** Engagement must be authentic and intentional and take the time to build relationships while being responsive to community identified needs. (*community led*)
- **Be accountable:** Sharing our progress in a transparent, relatable and engaging way that focuses on what matters to community

## Highlight Engagement Plan Components

A fulsome community engagement plan will be developed to support the creation of the new Corporate Strategic Plan. It is anticipated that the plan will include the following components and will draw heavily from the expertise and experience of staff leading reconciliation, equity and inclusion portfolios at the Region.

Regional Municipality of Waterloo will be 50 years old in January 2023. The past 50 years have brought many challenges, learnings and triumphs. This journey has been made alongside many committed and inspired elected officials, staff, residents, partners and businesses. The creation of a new strategic plan for the region will start posing questions about the path we want to take for the next 50 years and ask us what we hope to achieve together along the way. The process will help identify the bold strategies needed as a community and organization to reach our collective vision and thrive through current and future challenges.

Some of the proposed components of the community engagement approach include:

- An equity and inclusion lens to design meaningful opportunities for all.
- A Community Advisory Round table including representatives from different sectors (social, business and environmental) partner institutions and grass root community leaders (with diversity of representation and identities).
- The round table would be a mutually beneficial space to engage community leaders in a dialogue about the region's collective future and to help guide the process in collaboration with the Region.
- A Youth Advisory Group and youth engagement will be an integral part of the engagement plan. Youth provide a unique and creative perspective that enables innovative ideas and strategy. Staff will also draw upon learnings from successful models, such as the Community Safety and Wellbeing Plan, SMART WR and Children and Youth Planning Table amongst other approaches.
- Engagement with existing groups and committees such as Grand River Accessibility Advisory Committee.
- Large-scale public engagement through digital and in-person outreach tactics through events, 1-1s, small group meetings and 'on the street' connections to name a few.
- Resident Community Connectors will support the outreach through their networks and help build new relationships.
- The approach will also draw upon results of recent engagement efforts from projects and initiatives such as the Community Safety and Wellbeing Plan, Regional Official Plan and many more.
- The approach will draw upon recent survey findings from projects such as the Wellbeing Waterloo Region Mini-Wellbeing Survey and the Region of Waterloo Resident Experience Survey, Youth Survey and Immigration Survey.

## Draft Timeline

- November and December 2022: Laying the foundation with preliminary shorter-term priorities and foundational context as part of Plan and Budget 2023.
- January 2023 to July 2023: Setting the course through community engagement, future focused environmental scanning, strategy development workshops.
- July 2023: New Strategy approved by Council.
- August to December 2023: Implementation and aligning action. Approved Year 1 Plan and Budget.
- December 2023 and beyond: Measuring and improving our performance through ongoing implementation and reporting.

### **5. Background:**

The Region of Waterloo is in the final stages of its existing 2019-2023 Strategic Plan. The process to create a new plan will start posing questions about the path we want to take for the next 50 years and ask us what we hope to achieve together along the way. The process will help us identify the bold strategies we will need as a community and organization to reach our collective vision and thrive through current and future challenges.

The approach will also include future focused environmental scanning and research; the mapping of existing plans and strategies to identify current targets and goals; and the creation of a performance evaluation framework that will enable ongoing tracking of organizational progress over the life of the new strategy.

### **6. Area Municipality Communication and Public/Stakeholder Engagement:**

Extensive engagement and collaboration with area municipalities and our many shared partners will be critical to the success of the strategic planning process. Many area municipalities are also undergoing their own strategic planning processes during this time. This presents a perfect opportunity to identify our shared opportunities and challenges, and find new ways to work together within our respective roles to further the community as a whole.

#### **Public/Stakeholder Engagement:**

Creating a new Corporate Strategic Plan successfully will require significant community engagement using equitable engagement approaches. A full engagement and communications plan will be created in partnership with community members and partner organizations.

**7. Financial Implications:**

The draft 2023 budget includes \$200,000 for the development of the strategic plan and associated implementation activities. This includes developing supporting performance/data frameworks and organizational alignment activities as the Plan is rolled out across the organization over the coming years. This work is funded through contributions made each year from previous operating budgets placed in a reserve for the purpose of strategic plan development and implementation.

**8. Conclusion / Next Steps:**

The project plan and supporting community engagement plan supporting this initiative will be finalized based on Council input. Full implementation out of the project will commence in January 2023.

**9. Attachments:**

Appendix A - Strategic Plan Presentation Council December 6, 2022

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**Reviewed By:** Connie MacDonald, Chief Strategy & Communications Officer

**Approved By:** Connie MacDonald, Chief Strategy & Communications Officer