

Region of Waterloo
Chief Administrative Officer
Chief Communications and Strategy

To: Administration and Finance Committee

Meeting Date: April 4, 2023

Report Title: 2023-2027 Strategic Plan Update

1. Recommendation

For Information.

2. Purpose / Issue:

The purpose of this report is to provide Council with an update on the development of the 2023-2027 Strategic Plan.

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 support council in establishing new strategic directions and priorities for the organization based on current and future community needs and aspirations. The new strategic plan will serve as a guide for the plan and budget process for 2024 and beyond.

4. Report Highlights:

- On December 6, 2022 the Administration and Finance Committee approved the approach, timeline, and supporting principles for the development of the new Corporate Strategic Plan 2023-2027 (CAO-SPL-22-009).
- Council has begun setting the foundation for strategic planning through the 2023 Plan and Budget process. This has included discussions on current context, preliminary insights on local priorities based on community engagement and an in-depth overview of existing and potential future regional service levels.
- A consultant, Creative Futures, has been secured to support the development of the strategy. They will be using a strategic foresight methodology that includes trends research, scenario development and strategic priority setting. The consultants will facilitate workshops with Council, Region staff, youth and the broader community in the development of strategic priorities. The sessions for Council are being scheduled and will include a kick-off session in April, and sessions in May and June. Other key groups that will be instrumental in the process and engaged in similar sessions

- include Region staff, youth and a diverse Community Roundtable.
- The strategic planning activities to date have focused on:
 - i) **Establishing governance, engagement, and advisory groups to commence in March to early April.** Council will oversee the process, participate in engagement sessions, and will approve the Strategic Plan. To support Council in their leadership role, an Executive Steering Committee (internal Staff), a Youth Advisory Group, and a Community Round Table will provide advice and guide the project. An internal staff engagement team will help to facilitate engagement of staff across all roles and experiences at the Region. These groups will begin meeting in April and continue throughout the process.
 - ii) **Building a strong data foundation.** Staff have initiated key data analytics projects to provide Council, staff and community stakeholders with critical data to support strategic planning workshops in the spring. This work includes an interactive digital Community Profile sharing demographic data and data on key issues and trends facing Waterloo region within the context of Sustainable Development Goals. Staff are also mapping existing Regional strategies and master plans (both Region lead and Region affiliated), to share a clear inventory of actions and targets already underway on which the new strategy can build or adjust.
 - iii) **Staff have created an extensive communications and engagement plan.** The plan includes multiple channels of communication and methods of engagement. The purpose will be to promote the launch and create equitable opportunities for public and stakeholder input. Staff have already conducted various surveys, and have been collaborating with community partners to bring the voices of residents and businesses into the strategic planning process. There have been three primary surveys conducted in 2022 that will inform the Strategic Plan: a statistically robust telephone survey; a comprehensive, widely available online survey; and the Wellbeing Waterloo Region Mini Survey. In total, these surveys received over 7,500 responses. The strategic planning process will align with other major initiatives across the Region and seek to maximize engagement efforts and reduce duplication. Staff are collaborating on data, resources, and approaches to engaging with the public.
 - iv) **Ensuring equity in community engagement remains a priority.** Staff will ensure diverse representation throughout the governance structure, in communications, and data analytics.
 - Community and staff advisory meetings will begin in April and continue through to July 2023. Communications and outreach will follow in order to provide stakeholders and the broader public with information.
 - Extensive community outreach and engagement activities will be conducted between March and June 2023 to ensure that a broad range of resident perspectives

will be reached including voices not often heard.

- A full schedule of the process and engagement opportunities will be shared via the Region's EngageWR site.

Background:

The Strategic planning process has formally commenced. An internal staff project team is in place and overseen by an Executive Steering Committee supporting council. Community advisory groups are being established and these groups will be instrumental in ensuring that the engagement process is inclusive of all voices. They will also champion and support meaningful, equity-based conversations to create priorities that are most important and pressing in the community.

In the coming months, there will be ongoing development. Data will be published related to current and future demographics and trends that reflect the complexity and uncertainty of our community's context. This information is important to support engagement and decision-making.

The project page on the Region's EngageWR site has been set up to allow residents to provide their input online while also being informed of the overall process and other engagement opportunities. Regular updates will be provided to the public through social media, the Region's website and emails to stakeholders.

To reach individuals not often heard in past processes, we will be leveraging community relationships, outreach programs and staff, networks, and translating materials.

The 2022 Waterloo Region Wellbeing Mini-Survey is now closed. The data is currently being analysed and will feed into the strategic planning process. The collaboration successfully reached approximately 5,000 individuals across the region. This initiative involved 30+ partners across the community to provide a unique snapshot of community wellbeing as Waterloo region emerges from the pandemic. The survey steering and advisory groups will be meeting in late March 2023 to discuss next steps for future data analysis and for sharing the findings with the public.

Staff will also leverage data from recent community engagements and planning activities. Throughout 2021 and 2022, the public provided their input through a number of surveys that will inform the Strategic Plan. The following surveys have reached over 1,000 youth, 1,000 households and over 1,500 newcomers: The Youth Impact Survey, the Service Experience and Priorities Survey and the Waterloo Region Immigrant Survey.

Area Municipality Communication:

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. Staff at the region are working collaboratively with staff at area municipalities, via a local strategy planning group, and will continue to collaborate through the strategic planning process. We are also looking to engage All Council in the summer.

Public/Stakeholder Engagement:

A successful, new Corporate Strategic Plan will require significant community engagement using equitable engagement approaches. The public/stakeholder engagement process will be created in partnership with community members and partner organizations.

5. Financial Implications:

The approved 2023 operating 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 to a reserve for the purpose of strategic plan development and implementation.

6. Conclusion / Next Steps:

Council will be updated and engaged in a variety of ways throughout the entire process to develop the Strategic Plan. Council members will be participating in strategic workshops, group discussions, and surveys. Reports on the Strategy's progress will be provided to Council on April 4th and June 9th at Administration and Finance Committee. The new Corporate Strategic Plan is to be approved by the end of August 2023.

7. Attachments:

Appendix A - 2022 Plan Update Presentation

Prepared By: Van Vilaysinh, Manager, Corporate Strategy & Strategic Initiatives

Deb Bergey, Manager, Community Engagement

Reviewed By: Jenny Smith, Director, Corporate Strategy & Performance

Approved By: Connie MacDonald, Chief Communications & Strategy Officer