

Region of Waterloo
Chief Administrative Officer
Communications and Corporate Strategy

To: Administration and Finance Committee
Meeting Date: May 9, 2023
Report Title: Developing the new Corporate Strategic Plan 2023-2027 – A Progress Update

1. Recommendation

For information.

2. Purpose / Issue:

The purpose of this report is to provide Council regular monthly updates 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:

- The strategic planning process is leveraging local data, community and staff engagement and extensive mapping of existing Regional strategies. All of these elements will feed into a strategic foresight approach that encourages longer range thinking to establish four-year term priorities.
- The approach includes three main phases of work: Exploring the local context through data and trends; identifying preliminary strategic priorities; and finalizing the strategic priorities that will guide the Region through 2023-2027. Each phase will incorporate multiple engagements with community and staff. The results of these efforts will feed into three special Council decision making workshops that

build on one another over April, May and June.

- Council and Executive Team had their first of three strategic planning sessions on April 28, 2023. At that introductory session, Council learned more about the strategic planning process and had early conversations about the current community context [Appendix A] and anticipated key trends impacting Waterloo Region over the coming years to 2050 [Appendix B].
- During the workshop, the group discussed an extensive (but not exhaustive) list of trends effecting Waterloo Region, based on demographic and other local data, and results of staff and community engagement. The trends reflect a broad range of major disruptions and opportunities - social, technological, environmental, economic and political - that may impact Waterloo Region into the future.
- The conversations about each trend were rich and some that were highlighted as having the most impact on Waterloo Region in 2050 included (not in order of priority):
 - Housing crisis
 - Mental health and addictions challenges
 - Disrupted and changing municipal finances
 - Democracy under pressure
 - The potential of Waterloo Region to become Canada's economic centre
 - Rise in racial justice and the positive trend of increasing meaningful action
 - Increasing commitments to Truth & Reconciliation
 - Climate first leadership increasing, growing climate action and 15 minute communities
 - Significant growth in population in the Region of Waterloo
 - Food system transformation
 - Strong community connectivity, welcoming refugees, new immigrants, honouring Indigenous reconciliation, and supporting diversity. Recognition of global trends in rising hate related incidents
 - The changing nature of families
 - The economic division between those with the most resources and those living in poverty
- The next stages of the process will explore how the Region's new strategic plan can respond to these challenges and leverage the many opportunities we face.
- The next Council workshop will be in May, with a final session in June where Council will explore draft strategic priorities. These draft strategic priorities will be presented to Council for final review and approval in August so that they can begin to be incorporated into the 2024 Plan and Budget.

5. Background:

New draft strategic priorities will be developed by the end of June 2023, and following additional refinement will be presented to Council for final approval in August 2023. This anticipated timing is important to ensure the priorities can begin to be incorporated into the 2024 Annual Plan and Budget Process.

Along with setting strategic priorities, the organization is refreshing its Mission, Vision

and Values. These refreshed foundational components will ensure clear strategic direction and will help to prepare and align staff as they continue to work effectively together and with partners to achieve the new strategic goals.

6. Area Municipality Communication and Public/Stakeholder Engagement:

Area Municipality Communication:

The strategic planning process involves a number of opportunities for area municipal engagement and communications. Some examples of this include:

- Shared strategic planning presentation with area municipalities at an area municipal CAO meeting where shared strategic challenges and opportunities were discussed March 2023
- Municipal engagement invitations to roundtables May 2023
- All Council presentation and engagement opportunity June 2023

Staff continue to collaborate with area municipal partners throughout the process and invite continued dialogue and sharing of learnings from recent or current corporate strategic planning exercises.

Public/Stakeholder Engagement:

The strategic planning process is supported by an extensive community engagement and communications plan that aims to build relationships, embed equity, build trust and ensure multiple ways for all communities across Waterloo Region to participate including:

- Review of existing and current community engagement findings from recent projects (e.g. Waterloo Region Immigrant Survey, Community Safety and Wellbeing Plan)
- Surveys (e.g. collaboration with partners on the Community Wellbeing Survey 2022 and Region of Waterloo Resident Survey 2022)
- EngageWR opportunities
- Youth Engagement workshops in April, May and June
- Community connector outreach at community organizations, meetings, at venues and events across each township and city in Waterloo Region
- Partnering with others already hosting events to engage people where they are at (e.g. at Children and Youth Planning Table events – youth engagement bus)
- Community Roundtable workshops in May and June
- Staff surveys, presentations and workshops

The engagement will continue throughout the process and information on the schedule will be shared with Council, staff and the community through various communications, emails, EngageWR, Regional newsletters and social media.

7. Financial Implications:

The approved 2023 operating budget includes \$200,000 for the development of the 2023-2027 Strategic Plan and associated strategic implementation activities. The provision is funded through contributions made from operating budgets to a reserve for the purpose of strategic plan development and implementation which includes developing supporting performance/data frameworks and organizational alignment activities as the Plan gets rolled out across the organization over the coming years.

8. Conclusion / Next Steps:

The strategic planning process will continue as reported throughout the next three months. Council can continue to expect regular updates on progress as well as continued opportunities to participate in workshops and other engagements.

9. Attachments:

Appendix A: Community Context

Appendix B: Future Focused Planning – Trends and Facilitation Guide

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