

Region of Waterloo

Chief Administrative Officer

Strategic Planning and Strategic Initiatives

To: Administration and Finance Committee

Meeting Date: June 6, 2023

Report Title: Strategic Planning Process 2023-2027 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 development of the Strategic Plan 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.
- Multiple sources of data and information gathered from the community have been used to understand the local context. The strategy will build on existing data and work that is currently happening.
- Key strategies and plans were mapped to share an inventory of actions and targets already underway. Demographic and trends data has been summarized and is being transitioned to an interactive digital Community Profile that will launch online in the coming weeks.
- Youth voices have been central in the process. The process has leveraged the Children and Youth Planning Table Youth Survey and youth have participated in a series of workshops to provide their input on the vision for Waterloo Region in 2050, the actions that have to happen to support that and will be providing feedback on

draft strategic priorities.

- The process also focuses on reaching voices that we don't always reach such as equity deserving groups and diverse rural voices. To ensure broad outreach, various methods of engagement are being used, including formal workshops, surveys, attendance at community events, one-to-ones, community conversations, and online opportunities. These conversations will inform the draft strategic priorities. It is also important to note that the Region has engaged many communities through the recent Community Safety and Wellbeing Plan and Upstream Fund engagement, the findings and community priorities that have surfaced through this and other similar recent engagements is also being used to direct this work. Often community provide the feedback that the Region should use the voices and direction already provided to take action vs asking the same engagement questions again. Staff take this input very seriously, while also continuing to offer opportunities to broaden representation of those facing the most barriers to participation.
- Council leadership of the strategic planning process includes three strategic planning sessions in April, May and June. The first workshop in April focused on key trends impacting Waterloo Region in the coming years (CAO-SPL-23-003); the second workshop on May 29th will be to identify key strategic priorities; and the third workshop in June will be to review the draft strategic priorities that incorporates what we heard through broad community engagement.
- Engagement on draft priorities and refinement will continue in June and July for Council approval in August.
- A Council workshop is being planned for September to support the transition from strategic planning to 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. Communication and Engagement with Area Municipalities and the Public

Area Municipalities

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. The various methods to ensure diversity of voices include:

- The Community Wellbeing Survey 2022 and Region of Waterloo Resident Survey 2022)
- Use of findings from recent surveys and community engagement activities e.g. Waterloo Region Immigrant Survey, Community Safety and Wellbeing Plan,
- Participatory visioning, priority setting and draft priority feedback workshops for youth and community leaders
- Community Connectors hired to support outreach at community organizations and events across Waterloo Region (e.g., Porchlight Counselling in Ayr, New Dundee Artisan Festival, Tri Pride Festival and Multicultural Festival in Kitchener)
- Partnering with others who have planned engagement events (e.g. Children and Youth Planning Table events)
- Online opportunities available through EngageWR
- Region staff participation in surveys, meetings 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 two months. Council can continue to expect regular updates on progress as well as continued opportunities to participate in workshops and other engagements.

9. Attachments:

Nil

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