

Region of Waterloo

Chief Administrative Officer

Chief Communications and Strategy Officer

To: Administration and Finance Committee

Meeting Date: August 15, 2023

Report Title: 2023-2027 Strategic Plan

1. Recommendation

That the Regional Municipality of Waterloo approve the 2023-2027 Strategic Plan as outlined in report CAO-COM-23-003, dated August 15, 2023.

2. Purpose / Issue:

The purpose of this report is to provide Council with the draft 2023-2027 Strategic Plan for approval. In addition, the report presents findings from the review of the organization's vision, mission and values, which are foundational to the Strategic Plan and will help align staff to the new priorities. Council will received the final vision, mission and values in September.

3. Strategic Plan:

The creation of a new Corporate Strategic Plan 2023-2027 supports Council to establish new strategic directions and priorities for the organization based on current and future community needs and aspirations. The plan will serve to guide service alignment and capital programming over the coming years. The annual Plan and Budget process allows Council to implement the strategic plan in line with fiscal and operational feasibility and affordability.

4. Report Highlights:

- Waterloo Region is one of the fastest growing areas in North America and has much to celebrate. Overall residents experience a good quality of life; share rich and diverse cultures; have access to environmental gifts such as the Grand River and benefit from a diverse economy that supports local jobs and nurtures new technologies and solutions that contribute to global progress.
- As a unique community of cities and townships, we are preparing for 923,000 residents and 470,000 jobs by 2051. Growing in a sustainable, equitable and inclusive way requires ambition, vital partnerships and a shared vision for the future. With this in mind, Council embarked upon a strategic planning process that centred

the voices of communities across the region, considered data and explored the social, environmental and economic trends affecting us.

- The new Strategic Plan focuses on four integrated priorities. These foundational components provide clear strategic direction that will prepare and align staff in their work together and with partners to achieve priorities.
- The proposed Strategic Plan 2023-2027 (appendix A) centres around four integrated strategic priorities that together will steward inclusive and sustainable growth that supports equitable, safe and complete communities to flourish.
 - **Homes for all:** We will invest in affordable homes and economic opportunity for all that are part of inclusive and environmentally sustainable communities.
 - **Climate aligned growth:** As we grow, we will support a healthy environment where communities can thrive. Through intentional collaboration and creativity, we will support sustainable community growth.
 - **Equitable services and opportunities:** Through collaboration and innovative design, we will provide equitable, accessible services across Waterloo Region that support the social determinants of health and complete communities as we grow.
 - **Resilient and future ready organization:** The Region of Waterloo is a great place to work, where everyone is valued, feels they belong and where they have the support and tools to do a great job. We will be prepared for the future by providing a safe space for bold ideas and experimentation that transform services based on data and other ways of knowing.
- The new Strategic Plan 2023-2027 builds on the current Strategic Plan 2019-2023 and existing community priorities. Specifically, the new 2023-2027 Strategic Plan:
 - Elevates housing and homelessness as a priority, recognizing that a more holistic approach to solving the increasing housing crisis is required, which includes supporting economic opportunities that enable individuals to secure and retain their homes, and also supports strong community growth. In addition, the new strategy speaks more clearly to the diversity of housing required by a rapidly changing and diverse community.
 - Reinforces the previous focus areas of Environment and Climate Action, including the need for adaptation of infrastructure, land and services, but with a greater emphasis on sustainable community growth and more wholesale integration of a climate lens for all Regional infrastructure, services and land utilization.
 - Integrates the previous focus area of Healthy, Safe and Inclusive communities across all four new priorities and increases the focus on building and expanding equitable service delivery across the Social Determinants of Health and the development of complete communities.
 - Integrates the need for sustainable, accessible and affordable transportation across the new priorities, including exploring new mobility models for underserved communities, fostering car alternative options and continued

- investment in active transportation.
 - Integrates elements of previous focus areas of Responsive and Engaging Public Service and Our People into one holistic priority that speaks to a resilient and future focused organization. The new strategy puts greater emphasis on advancing reconciliation, equity, diversity and inclusion initiatives, digital and service transformation and exploring new service models and partnerships to achieve fiscal resilience and better service overall.
- The new Strategic Plan will launch shortly after Council approval and will start influencing decisions immediately through the 2024 Plan and Budget process.
- Staff will continue to work with Council and community to finalize a performance measurement framework for regular transparent reporting to Council and community.
- In addition to the strategic planning process, staff undertook a pulse-check review of the organizational vision, mission and values.
- Work continues to finalize these important foundations, that will be critical for organizational alignment and building the culture required to achieve strategic goals for community.
- The review identified that although the existing mission, vision and values were still relevant to varying degrees, there was a clear appetite to refresh them, elevate equity diversity and inclusion and; to better reflect the need to be a more forward-looking and nimble organization.
- Important themes that came through in the review included:
 - A focus on people, most notably residents
 - A desire to centre equity, justice and reconciliation
 - The need to elevate climate and environmental sustainability
 - A commitment to being a caring and compassionate community
 - Maintaining an action- and future-oriented stance
- Early drafts of the mission, vision and values are available in the appended staff presentation.

5. Background:

- 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).
- The Strategic Plan process officially commenced in April 2023 and included three main phases: Exploring the local context through data and trends; identifying preliminary strategic priorities; and finalizing the strategic priorities to guide the Region through 2023-2027.
- Council completed three strategic planning sessions in April, May and June, which drew upon extensive community data, analytics and community engagement results. The summary results of each stage of the process are documented in the attached Final Report (Appendix A).
- Extensive community profile data informed the process. A digital data hub, based on

this data is now available as a resource on the Region’s website, sharing demographic data and data on key issues and trends in Waterloo Region. An alternative to the web based version may be requested.

- Regional strategies and master plans (both Region lead and Region affiliated) were mapped to share a clear inventory of actions and targets already underway. It identifies those plans and strategies that may need calibration in line with the new priorities over the coming years. Appendix B lists the plans that were reviewed and mapped.
- The engagement strategy focused on reaching voices that we do not always reach such as residents living in the countryside, youth, seniors, Indigenous peoples, and equity seeking groups. Thousands of people across the region provided input. A summary of engagement activities is included in the final report. Some key highlights of engagement included:
 - Connecting with people at various community events including: New Dundee Artisan Festival, KW Multicultural Festival, Township of Wellesley Backyard BBQ, Hespeler Music Festival, Waterloo Jazz Festival, Seniors’ Lunch in Ayr, Public Health Outreach Clinics (Cambridge, Wilmot, Woolwich, and Waterloo), Rural Open Houses at Woolwich Town Hall and Wellesley Community Health, Ayr Library.
 - Workshops with Council, youth, community partners, and Region staff.
 - Extensive outreach to staff across the Region in all roles and departments.
 - EngageWR online public survey and staff engagement survey was made available for those who we could not reach through other in person methods.
- Staff continue to improve internal performance, tracking and monitoring systems to ensure accountability and transparency. Performance on current strategic initiatives are regularly updated on a live internal dashboard and reported publicly on a quarterly basis with the community. Continuing to build on a culture of data and performance, a corporate performance framework will be developed based on the new strategic priorities and will capture key service-level data.

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:

The strategic planning process incorporated an extensive community engagement and communications plan that aimed to build relationships, embed equity, build trust and provide multiple ways for all communities across Waterloo Region to participate. To ensure diversity of voices, various methods included:

- 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
- Partnering with others who have planned engagement events (e.g. Children and Youth Planning Table events, Ending Chronic Homelessness initiative and Charles Street Terminal engagement initiative)
- Online opportunities available through EngageWR
- Region staff participation in surveys, meetings, drop-in events and workshops

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:

Following approval of the 2023-2027 Strategic Plan, staff will create a consistent measurement framework that will result in regular and transparent progress and impact updates to Council and community. The performance framework will also serve as a basis for continuous improvement, learning and innovation at the operational level.

The new Strategic Plan will launch late August to early September and will start influencing decisions immediately through the 2024 Plan and Budget process.

Staff will finalize the Region’s Mission, Vision and Values statements and bring forward for Council approval in September.

9. Attachments:

Presentation: 2023-2027 Strategic Plan

Appendix A: 2023-2027 Strategic Plan Final Report

Appendix B: Strategic Plan Inventory

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

Deb Bergey, Manger, Community Engagement

Reviewed By: Jenny Smith, Director Corporate Strategy and Performance

Connie MacDonald, Chief Communications and Strategy Officer

Approved By: Bruce Lauckner, Chief Administrative Officer