



Corporate Strategic Plan

Considerations and Research Summary

Subject Municipalities:

- City of Guelph
- City of Cambridge
- Town of Saugeen Shores
- Town of Georgina
- Town of Innisfil
- City of Langford

Key Considerations

The following is a high-level summary of the key considerations and ‘lessons learned’ distilled from discussions with municipal staff at the subject municipalities.

1. **Strategic Focus:** The strategic plan should be high-level and focus on the intended outcomes that Council wants to achieve within the term. The operation details should be confirmed by staff through the budget and annual business plan. The plan should only focus on goals and outcomes that are realistic and within the jurisdiction/authority of the Town.
2. **Council's Role:** Council role should be high-level and focused on setting the vision, mission, values and the intended outcomes. Council should be engaged in interviews and workshops to provide insight into the needs and desires of the community. Council should also be used to ‘pulse check’ and to confirm alignment between the action items and the objectives/vision.
3. **Stakeholder Engagement:** Public engagement should be tailored to the willingness of the community and stakeholders. Be mindful of survey fatigue and be realistic about the level of engagement that is required – not everyone will want to be engaged and expect the participation rates to be lower than average. Look for opportunities to leverage existing public engagement channels and feedback to avoid duplication (ex – Resident Satisfaction Surveys, Master Plan surveys, etc.)
4. **Plan Structure:** Organize the plan development into phases for organization and clarity. There are likely to be times of uncertainty or disagreement on the strategic direction, and completing the plan in phases will ensure that each phase is given the attention it deserves. Each phase should receive unanimous Council support before moving to the next.

5. **Timing and Duration:** Align plans with the Council's term for synchrony, allowing comfortable transition time (generally a one-year overlap).
6. **Performance Measurement:** KPIs should be confirmed and approved alongside the strategic plan. A reporting frequency should be approved by Council with a clear understanding of the reporting structure and the level of detail to be included. Look for opportunities to leverage technology to foster public trust in the implementation of the plan.
7. **Communication:** Develop project-specific branding to highlight the importance of the strategic plan and to increase public awareness and interest. Use a variety of communication tools to reach as many residents as possible – but be realistic about participation and engagement rates.
8. **Support:** The plan needs to be fully supported by the CAO and senior leadership team to create staff buy-in and support throughout the organization. Council also needs to create the space and opportunity to truly consider and value the feedback provided by staff. This is essential as the operational details will be developed, planned and implemented by staff through the annual budget process. Without the buy-in, the plan risks poor implementation.
9. **Consultant Support:** Consider hiring or requiring a specialized facilitator in addition to the primary consultants who are engaged. There is an opportunity to either package everything together under one contract or to parcel the consulting work into phases, but this requires strong internal project management and commitment from Council to stay on track.

Research Summaries

The following section provides a summary of insights gathered from interviews with staff from the selected municipalities, highlighting their strategic planning approaches, processes, and key lessons learned that could inform the development of the Town's Corporate Strategic Plan.

1. City of Guelph - Future Guelph: Strategic Plan 2024 – 2027

- **Focus and Philosophy:** The strategic plan is too operational. Future focus should be on broader goals, with annual business plans handling operational details. The plan serves as the "north star," with business plans as the actionable elements.
- **Council's Role:** Council's role was to set the vision and focus on outcomes, avoiding operational specifics. Council was kept informed through regular reporting throughout the process and was formally re-engaged near the end to confirm alignment between the action items and the objectives/vision.
- **Timing:** The strategic plan process is aligned with the first year of the new Council term.

- **Priority Setting:** Goals and outcomes were prioritized with Council based on the understanding that the city can't do everything. Instead, they focused on having the Council agree to a limited number of priorities and accomplishments that they would be proud to achieve over the three-year period.
- **Support and Structure:** The strategic plan process received strong support from the CAO and senior leadership. The process was guided and supported by a cross-department advisory committee with specific terms of reference.
- **Public Engagement:** Their approach to public engagement relied on the previous public and stakeholder data that was collected through other projects to avoid duplication of effort and redundancy.
- **Process:** The process involved a step-by-step completion philosophy. Council set the vision, senior leadership set the mission, and HR established the values. This was followed by Council interviews and workshops to confirm the desired outcomes and then by staff to design the action items. The action items were then pulse-checked with Council to confirm alignment.
- **Reporting:** An annual progress report is presented to Council of the initiatives and KPIs associated with the plan.

2. City of Cambridge – Connected Cambridge: Strategic Plan 2024 – 2026

- **Focus and Philosophy:** The strategic plan is high-level and outcome focused. The annual business plan sets the operational details.
- **Council's Role:** Council's initial role was focused on setting the vision, mission and values. This was followed by Council setting objectives and establishing intended outcomes. Their involvement throughout the process was high-level and they avoided getting into operational details of how the plan would be accomplished.
- **Timing:** Their Strategic Plan cycle was not aligned with the term of Council. To course-correct, they developed a two-year strategic plan that provides overlap into the first year of the new term of Council.
- **Priority Setting:** The actions and initiatives were designed based on the objectives set by Council, and were focused on a lead vs. collaborate philosophy. The priority setting was related to what the City could lead based on mandate and capacity and what the City could collaborate on with municipal partners and agencies.
- **Support and Structure:** The development of the plan was led by the Corporate Strategy Team with strong support from the CAO and senior leadership team. The City spent significant time at the staff level to develop implementation resources to enable and reinforce the values and importance of the strategic plan.

- **Public Engagement:** They conducted minimal public engagement and instead leveraged existing feedback from surveys and master plans.
- **Process:** Their strategic plan process was organized into four phases: Understand and Align, Collaborate & Create, Build for Success and Enable. Interviews and workshops were held with Council to conduct a gap analysis and to set the vision, mission and values to guide the strategic plan. Council was kept informed through regular reporting throughout the process. Council was involved throughout the process to endorse the key components and was responsible for confirming alignment between the action items and the objectives/vision.
- **Reporting:** They are working to create a Balanced Operational Scorecard (organizational health check) and to launch a Corporate Performance Dashboard to ensure regular reporting.

3. Town of Saugeen Shores - Strategic Plan 2023 – 2027

- **Focus and Philosophy:** The strategic plan is high-level and outcome-focused, and the annual business plan is the tool used to outline and confirm the operational details. As a next step, they are working on a plan to have the annual business plans tied to individual employee performance plans.
- **Council's Role:** Council's role was to set the vision, mission, values and goals, and to identify priorities for the Council term. Council's input was high-level and strategic in nature, with the annual business plan detailing the "how."
- **Timing:** Their strategic plan aligns with the term of Council, plus one additional year for continuity.
- **Priority Setting:** Council identified and confirmed the priorities that they wanted to achieve during their term. This was confirmed through a SWOT analysis, Council interviews and a strategic framework validation workshop.
- **Support and Structure:** The strategic planning process was strongly supported by the CAO and senior leadership team. It included an all-staff survey to gain perspective from employees at every level of the organization. Staff throughout the Town were engaged through regular update meetings.
- **Public Engagement:** Public engagement was very limited as they relied on public and stakeholder feedback completed through other projects and plans. They supplemented the public engagement with direct in-person engagement with pop-up's at community events and at the grocery store.

- **Process:** The process included one-on-one interviews and workshops with Council to set and validate the strategic framework (vision, mission, values and strategic pillars). This was followed by staff developing the specific actions and progress measures based on each strategic direction. The timing and resources to implement the action items are confirmed through an annual business plan that is approved by Council through the budget process.
- **Reporting:** They launched the strategic plan with a Corporate Performance Dashboard. Data from the Corporate Performance Dashboard is used to create a quarterly progress report that is presented to Council.

4. Town of Georgina - Georgina's Game Plan: Strategic Plan 2023 – 2027

- **Focus and Philosophy:** The strategic plan is the north star for the Town, and it includes action-oriented initiatives to support the implementation and realization of the Town's goals. The strategic plan is linked and closely connected to annual work plans for specific implementation details (timeline, resources, staff lead, etc.)
- **Council's Role:** Council was fully involved and highly engaged throughout the process. Council set the direction (vision, mission and values) and also provided insight into the specific action items that should be achieved within the jurisdiction and scope of the Town to address.
- **Timing:** Their strategic plan aligns with the term of Council, plus one additional year.
- **Priority Setting:** Priorities were based on items within the Town's jurisdiction and scope and were focused on specific goals that will help achieve progress against the strategic pillars. There was acknowledgement early on in the process that there are certain community issues that are not the responsibility of the Town.
- **Support and Structure:** The strategy process was supported by an internal working group that focused on project management and data analysis.
- **Public Engagement:** Significant public engagement was conducted throughout the process, including community surveys, pop-up events, focus groups and workshops. There was also a clear commitment to communicate and engage the community as the plan is implemented.
- **Process:** The process included interviews and workshops with Council and staff and a detailed environmental scan of 20+ municipalities. This was followed by a more detailed staff-level survey and workshop and a comprehensive public engagement phase. Time was also allocated to engage with community organizations, local businesses and indigenous groups. To support the strategic plan process, they developed a strong branding campaign, "Georgina's Game Plan", that included signs, advertisements, and promotion items such as shirts and hockey pucks, all in an effort to generate public awareness and engagement.

- **Reporting:** Annual progress reports will be presented to Council and staff are in the process of developing KPI's.

5. Town of Innisfil – Strategic Plan 2030

- **Focus and Philosophy:** The strategic plan is very specific and results-oriented. The plan does not include operational details, as these are set within the annual business plan based on resources.
- **Council's Role:** Council's was engaged through a public workshop to set the vision, mission and values. Council was kept informed throughout the process by regular staff reports. Council was re-engaged at later in the process to review the action items and performance measures.
- **Timing:** Their strategic plan was developed as a seven-year plan (2023 – 2030) to guide the Town. The action items are included in annual work plans and decided by staff based on the availability of resources and other priorities.
- **Priority Setting:** The priorities were set by Council through a current state and priority setting workshop. The priorities were based on the guiding values that were established by Council to support the vision, mission and values.
- **Support and Structure:** The plan was fully supported by the CAO and senior leadership team. They established a small staff-led project team that met regularly with the consultants. The senior leadership team used their regularly scheduled department meetings to review the plan with staff to foster support.
- **Public Engagement:** They conducted minimal formal public engagement except for a public survey. All other public engagement relied on residents watching the open session Council meetings, which included Council workshops held in open session.
- **Process:** The process included a detailed SWOT and gap analysis, interviews with Council and the senior leadership team, an all-staff survey and two Council workshops (Current State Review & Priority Setting, and Visioning & Validation). The workshops were open to the public, but they were held in an offsite neutral facility (not recorded or live-streamed). This was important as it allowed for a more natural and honest dialogue.
- **Reporting:** Staff are working to develop KPI's and will be providing regular reports to Council. KPI's were not included within the initial scope of work.

6. City of Langford – Council Strategic Plan 2023 – 2027

- **Focus and Philosophy:** Their strategic plan is actionable, with concrete objectives and realistic timelines. They do not view it as a ‘to-do’ list; instead, it is viewed as an adaptive guide to orient the city in a direction that is aligned with their vision, mission and goals. The specifics and operational details are confirmed through the City’s annual budget.
- **Council's Role:** Council was involved throughout the entire process, but only at a high level and they did not engage in the operational details. Council established the vision and core values through a series of public workshops.
- **Timing:** The plan is tied to the term of Council plus one additional year to ensure continuity.
- **Priority Setting:** The priorities were selected based on the principles of the core values and the objectives to address the shared crises identified within the plan—housing affordability, climate, inequality, and infrastructure cost.
- **Support and Structure:** To support the process, they created an internal working group including the City Manager, Deputy City Manager and Director of Communications. They engaged all staff on the importance of the Strategic Plan, but relied on the Directors to review the details of the plan with their respective teams and to present feedback to the senior leadership team.
- **Public Engagement:** They conducted a public survey and a public open house at the beginning of the project to gain initial feedback. Existing data and feedback from master plans and the resident satisfaction survey was also referenced. All meetings and workshops were conducted in open session.
- **Process:** They conducted a series of public workshops with Council, the first of which focused on an introduction to strategic planning. Through the workshops, Council set the vision, mission and core values. The senior leadership team led the development of the objectives, timelines and KPIs. The plan was then pressure tested with Council to ensure alignment.
- **Reporting:** They provide two progress reports to Council each year. The mid-year report is only a verbal update, and the end-of-year report is a formal report highlighting the status of each objective and the KPIs. The final report is used to inform the annual budget and business plan.

Evaluation Method

	Procurement	Evaluation Criteria
City of Guelph	RFP	10% Project Understanding 30% Methodology, Approach and Schedule 40% Overall Experience and Qualifications 20% Fees
City of Cambridge	No RFP – Completed by direct purchase	No specific evaluation criteria. They prioritized experience in selecting a consultant
Saugeen Shores	No RFP – Completed by direct purchase	No specific evaluation criteria. They prioritized experience in selecting a consultant
Town of Georgina	RFP	5% Introduction and Relevant Experience 10% Project Team Experience and Qualifications 30% Approach, Work Plan and Timelines 35% Presentation and Interview 20% Fees
Town of Innisfil	No RFP – Completed by direct purchase	No specific evaluation criteria
City of Langford	No RFP – Completed by direct purchase	No specific evaluation criteria. They prioritized experience in selecting a consultant