



SUBJECT: Vision to Focus re-calibration approach

TO: Corporate Services, Strategy, Risk & Accountability Cttee.

FROM: Corporate Strategy

Report Number: CS-04-21

Wards Affected: All

File Numbers: 155-03-01

Date to Committee: April 7, 2021

Date to Council: April 20, 2021

Recommendation:

Endorse the proposed Vision to Focus re-calibration approach to support the 2018-2022 Burlington's Plan from Vision to Focus top priorities and goals as outlined in corporate strategy department report CS-04-21.

PURPOSE:

Vision to Focus Alignment:

- Increase economic prosperity and community responsive city growth
 - Improve integrated city mobility
 - Support sustainable infrastructure and a resilient environment
 - Building more citizen engagement, community health and culture
 - Deliver customer centric services with a focus on efficiency and technology transformation
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Background and Discussion:

Committee received a companion report in this same agenda (April 7) on the High Level Corporate Strategy Workplan Update – March 2021 (CS-03-21) including an update on the March 22 workshop. This report provides more detailed information about the workshop and its outcomes.

Strategy/process

As described during the workshop, the principles of successful outcomes include strong leadership, a strategy that works and a focus on execution. Execution happens in [2018-2022 Burlington's Plan From Vision to Focus](#) (V2F). It is the consecutive, shorter, defined period plan that lays out Council's priorities and goals to align with the City's long-term 25-year vision. V2F contains 11 priorities and goals and for each a key action, a 4-year performance target and a 25-year aspirational target (found on pages 10 and 11). As the Council term progresses, staff monitor, track and report on the progress made. The defined period offers opportunity to re-calibrate to reflect unforeseen changes – like a pandemic – or other major changes, for example, upper government changing legislation. The outcome is to make our way closer to the vision.

Connectivity, Synergies and Collisions

Implementation of V2F initiatives requires careful planning. Yet with all the planning, there are still challenges and barriers to successful execution including competing priorities, lack of capacity due to time and resource constraints, and impacts from day-to-day operations and interdependencies.

During the workshop, Council heard of the connectivity, synergies and collisions that occur in our journey to achieve our vision for Burlington's future as demonstrated in Appendix A. This schematic demonstrates how our strategic directions drive our 4-year priorities and goals that drive the initiatives. It also shows how there are synergies in the many-to-many relationships between the strategic directions and 4-year priorities and goals and in the initiatives in play to accomplish the priorities and goals. For example, a City that Moves is connected to V2F priorities and goals of business growth, transit utilization, modal split, infrastructure funding gap, climate action, community engagement, service excellence and customer first approach.

The synergy is found in the initiatives that serve multiple priorities and goals. For example, 2.3 Complete the Burlington Transit 5-year business plan supports the primary achievement of transit utilization as well as supporting achievement of customer first approach, service excellence, community engagement, climate action, infrastructure gap, modal split, housing and business growth.

There is complexity in the initiatives and collisions as the work progresses to accomplish the 11 top priorities and goals. With a defined workforce, and only so many hours in a day, there is competition for resources, time and effort. Staff are not only working to deliver services each and every day to better serve our community, more often those same staff are also working on more than one V2F initiative; each of which has its own timelines and deliverables.

Council Engagement & Discussion

The purpose of the workshop was to promote dialogue among Council about their top priorities as an input into the re-calibration process.

Council's Engagement

Council was engaged in two exercises - straight ranking and refining focus - to help inform, if not prompt, dialogue and discussion about where there may be opportunity to refine the 11 top priorities and goals identified in V2F.

Council's first exercise was a straight ranking of each top priority and goal. The purpose was to draw out an order of importance from 1 to 11.

Council's second exercise was a refinement to identify relative change in focus. Each of the 11 top priorities and goals was assigned the same nominal value and Council increased and decreased the value between the priorities and goals to achieve a balanced outcome. The nominal value was simply an amount for the purpose of the exercise and not representative of any value of the work associated with the priority and goal.

Prior to the exercises, Council was informed of the progress to date on the 4-year performance targets and provided with information about completed V2F initiatives. In completing the exercises, Council was asked to give consideration to three areas: possible impacts to the community and organization in shifting focus, connected city initiatives and projects and our ability to achieve the goal.

The results of the ranking and refining focus exercises are provided in Appendix B.

Council's Discussion

As mentioned, the purpose of this workshop was to promote discussion among Council, and to this end, we accomplished our goal. Council was engaged in the discussion through three facilitated questions:

1. What are your observations or conclusions about these results?
2. What is your level of comfort with the results?
3. What additional feedback about V2F would you like to share?

Through this discussion, Council expressed their continued support for all the top priorities and goals. There was also clear recognition of the link to the 25-year strategic directions. It was noted by Councilors that not one priority saw a significant or appreciable increase or decrease suggesting there is no discernable change in any of the priorities' importance. It was clear, through the comments and observations, Council understands the 25-year vision and V2F are the "long-term plan with short-term adjustments".

Of note in the discussion was the context within which each member considered the priorities such that they placed emphasis on one priority over another priority. For example, considerations could be influenced by the situations outside of our control (e.g. the pandemic), the length of time remaining in the Council term, and/or major reports or information recently consumed by Council. This is a condition not easily treated as biases inherently exist. However, future discussions could start with each Council member sharing their assumptions so a shared context can be created as the starting point.

There was considerable discussion on the three service-oriented priorities – better described as those categorized in Focus Area 5: Delivering Customer Centric Services with a Focus on Efficiency and Technology Transformation. This discussion stemmed from the ranking and refining focus results where these priorities found their way to the top 4 ranking in both exercises (Table 1).

Ranking	Straight Ranking	Refining Focus
1	Digital Transformation	Customer First Approach
2	Business Growth Service Excellence	Digital Transformation
3	Community Engagement	Community Engagement
4	Customer First Approach	Service Excellence

Table 1: extract from all rankings; refer page 5 of Appendix B.

Council's comments with respect to these priorities in this ranking generally reflected the desire for focusing on the resident and, in particular, the needs of the community during this pandemic (e.g. digital delivery of services). There is a natural connection between digital transformation, service excellence and customer first approach. Introduction of technology that makes it easier, better and more efficient for the resident will positively influence service excellence and a customer first approach.

While these rankings prompted discussion, Council expressed the importance of all of the priorities and goals indicating the need for work to continue in all areas. It is important to note staff have not taken these rankings as a change in priorities. Rather with these rankings, management will be reviewing these specific priorities and goals (referred to in Table 1) to determine the optimal combination of initiatives to show progress.

Part of the discussion highlighted the interplay of designing and evolving our organization, workplace culture and strategy to move closer to the vision. This interplay requires a degree of discipline to understand the resource needs, including the human capital and financial needs. This requires focus on the business planning process to

provide the necessary information to make the decisions for the long-term plan and short-term adjustments, including the longer term financial and resource implications. Corporate business planning needs to recognize the inter-connectivity of process, finances, customers, and our staff to accomplish the common goals. We acknowledge that some initiatives are more aptly described as part of day-to-day operations and are better placed in department or service workplans. The re-calibration work will include review of all initiatives contained in V2F and will fully disposition those moved to department or service workplans.

The information provided to Council contained the list of completed V2F initiatives and status of key performance measures aligned with each top priority and goal in an effort to level set understanding as to progress and to help inform their discussion. The Council discussion emphasized the need for refinement of our achievable performance targets (4-year workplan). The re-calibration work will include review of these targets and changes as necessary to improve the leading measure. This refinement of measures also applies to the desired goals related to our vision for the future – our 25-year strategic plan. We are currently working through the refresh of the desired goals in our strategic plan to identify the targets that will mark progress in our journey to 2040. These targets will be time-bound; i.e. from X to Y by 20XX.

It appears there is some support for combining like priorities and goals in this version of V2F; for example, transit utilization and modal split. These two priorities and goals are categorized within Focus Area 2: Improving Integrated City Mobility and are intrinsically linked. Increasing public transit use will lead to better results in terms of modal split. To put it another way, public transit use (i.e. ridership) is the leading measure and modal split is the longer term outcome. In future V2F plans, we would refine the goals so there is clarity of purpose. In this example, the priority would be “Integrated City Mobility” with a goal statement of “Improving the transit and transportation modal split with more trips being made by transit, carpooling, cycling and walking.” The associated performance target would be the modal split targets. Accomplishing this goal would include the alignment of actions and deliverables of a number of plans including, but not limited to, the Transit 5-year business plan, the Integrated Mobility Plan, the cycling master plan and the parks master plan. Within the service areas, (e.g. Transit service and Transportation Planning), key performance measures (e.g. transit ridership and modal split) would be identified, tracked and monitored to assess progress towards the goals.

Proposed V2F Re-calibration Approach

The dialogue among Council was valuable to reinforce the importance of service delivery from our customer’s perspective. For each of the 11 priorities and goals, Table 2 (below) highlights where the City has direct responsibility, has a supporting role to a larger multi-level government goal, and the anticipated horizon or timeline to achieve

the goal. It also indicates the approach for management to consider the alignment of resources to see progress in a top priority and goal and where implementation of existing plans will continue. With this information, management and staff can work together to determine the optimal combination of initiatives and timelines to continue work and to advance progress for the priorities and goals.

Table 2 – Proposed V2F Re-calibration Approach						
Focus Area	Top Priority & Goal	City’s Direct Responsibility	City has a Supportive Role	Horizon to Achieve Goal	Alignment of Resources to Progress toward 2022 Targets	Continue with Existing Plans to Stay on Track to 2040 Targets
1: Increasing Economic Prosperity & Community Responsive Growth	Housing		√	Medium		√
	Business Growth	√		Short to Medium	√	
2: Improving Integrated City Mobility	Transit Utilization	√		Short to Medium		√
	Modal Split		√	Medium		√
3: Supporting Sustainable Infrastructure & A Resilient Environment	Tree Canopy	√		Medium to Long		√
	Climate Action*		√	Medium to Long		√
	Infrastructure Gap**	√		Medium to Long		√
4: Building More Citizen Engagement, Community Health & Culture	Community Engagement	√		Short	√	
5: Delivering Customer Centric Services with a Focus on Efficiency and Technology Transformation	Customer First Approach	√		Short	√	
	Digital Transformation	√		Short to Medium	√	
	Service Excellence	√		Short	√	

* The City’s climate emergency declaration, in April 2019, increased the city’s ambition on climate change initiatives, including in the community, and provided staff and residents with clarity of purpose regarding Council’s view of the importance of climate change.

** The infrastructure funding gap has been a longstanding priority and goal of this and past Councils such that a specific tax levy is in place to generate additional funds to help close the gap.

Legend:

Goal Horizons = Short – within 4 years
 Medium – within 5 to 10 years
 Long – greater than 10 years

Financial Matters:

The financial resources needed to advance progress and continue implementation of existing plans for the identified priorities and goals will be defined and considered in the 2022 budget.

Climate Implications

Climate action continues to be a priority and goal of this Council and work will progress to implement the climate action plan and define the climate adaptation plan.

Engagement Matters:

Burlington's City Council was the primary party in this engagement. Additional consultation and input were sought from the Burlington Leadership Team (BLT) and Burlington Economic Development. There will be continued discussion amongst BLT to align and coordinate the necessary adjustments, continued Council updates and work related to advancing our strategic plan.

Conclusion:

This direction supports management's work to align initiatives with resources, assess the risks and ways of minimizing the risks, and focus our staff in providing professional insights and recommendations to help make the short-term decisions leading to long-term goals. This work will result in an updated V2F for Council's endorsement in July.

Respectfully submitted,

On behalf of the V2F Working Group and the Burlington Leadership Team by

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Appendices:

- A. CS-04-21 Appendix A – Visualizing Connectivity, Synergies and Collisions
- B. CS-04-21 Appendix B - Council Workshop Engagement Exercise Results

Report Approval:

All reports are reviewed and/or approved by Department Director, the Chief Financial Officer and the Executive Director of Legal Services & Corporation Counsel.