



**SUBJECT: High level corporate strategy workplan update – March 2021**

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

**FROM: Corporate Strategy**

Report Number: CS-03-21

Wards Affected: All

File Numbers: 155-03-01

Date to Committee: April 7, 2021

Date to Council: April 20, 2021

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**Recommendation:**

Endorse the updated City of Burlington’s high-level corporate strategy workplan as proposed and outlined in Appendix A of corporate strategy department report CS-03-21.

**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:**

On March 12, 2020, the Corporate Services, Strategy, Risk & Accountability (CSSRA) Committee endorsed the City of Burlington high-level corporate strategy workplan outlining the inaugural cycle to capture the periodic review of Burlington’s Strategic Plan (BSP) 2015-2040 and regular review 2018 – 2022 Burlington’s Plan: From Vision to Focus (V2F) (CM-08-20).

This workplan set the precedent for:

- a 5-year cycle review of BSP 2040 providing the opportunity to consider current state and future trends in key areas, such as, economics, demographics, environment, and socio-economic vis a vis aspirational goals and high-level strategies,
- annual re-calibration of V2F which is critical to prioritization of resources, the assessment and mitigation of risk, and ensuring employees and other stakeholders are working toward common goals,
- establishing and implementing an enterprise risk Governance framework, and
- establishing accountability for V2F through regular reporting on progress to meeting key performance indicators and key target dates.

As a result of the focus required for pandemic-related response initiatives, the CSSRA committee was informed of deferrals in the expected deliverable dates for all of the proposed activities outlined in the high-level corporate strategy workplan. The first deferral was provided to Committee during the May 14<sup>th</sup> COVID Verbal update (CSSRA-03-20) and the second deferral was provided to Committee in September 17<sup>th</sup> (CM-24-20) anticipating a March 2021 completion date.

### **Strategy/process**

With the pandemic response continuing, the revised high-level corporate strategy workplan is amended as included in Appendix A. Notwithstanding the protracted period of time it is taking, work has started on the refresh of Burlington's Strategic Plan 2015-2040 and the re-calibration of V2F.

In November 2020, Council, Burlington's Leadership Team and members from Burlington Economic Development participated in a 2-part workshop series highlighting the five focus areas of V2F. These workshops provided opportunity for the participants to hear from external and internal sources on trends in each of the focus areas and discuss how these trends affect the goals of the focus areas. This information is valuable to the recalibration of V2F.

In February 2021, Council was engaged in a workshop focused on understanding: the strategic directions, broad objectives and the aspirational goals identified in Burlington's strategic plan 2015-2040, what a long term vision is, and what the role of council and management are in defining that vision. Through this workshop, Council gained a level of comfort with the refreshed version the strategic plan Burlington's Strategic Plan 2015-2040. Work continues on the refreshed version including definition of desired goals. The refreshed version will be brought to Committee in May.

In March 2021, Council was engaged in a workshop designed to bring a level of focus to the V2F work in the remaining term of this council as we progress towards the vision of

the future. Identifying Council's priorities among the top priorities in V2F (pages 10-11) will enable management to align initiatives with resources, assess the risks and ways of minimizing the risks, and focus our committed 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. A companion report on this agenda provides more detail of the outcome of this workshop. Please refer to Vision to Focus Priorities (CS-04-21).

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### **Financial Matters:**

To date, the work to refresh Burlington's strategic plan and re-calibrate V2F has been completed with existing City resources within the current mandates of staff.

### **Total Financial Impact**

Minimal impact to be accommodated within existing budgets.

### **Source of Funding**

The strategic plan reserve fund could be utilized to support the review and re-calibration work as needed.

### **Other Resource Impacts**

Involvement will be required from key stakeholders, such as Burlington Economic Development Corporation and internal management and staff.

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### **Climate Implications**

Not applicable.

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### **Engagement Matters:**

Council workshop material and reports are included in the relevant agendas for public reference.

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### **Conclusion:**

The vision for Burlington, as described through Burlington's Strategic Plan 2015 – 2040, sets out the aspirational goals for our community. It is the strategic objectives and

actions detailed in 2018 – 2022 Burlington’s Plan: From Vision to Focus that begin to bring the City closer to these aspirational goals through achievable results. The work to refresh and update the strategic plan and V2F ensures their relevancy and alignment, and reporting on our progress promotes accountability.

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Respectfully submitted,

Sheila M. Jones, CIA, CRMA

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**Appendices:**

- A. CS-03-21 Appendix A: Updated High-Level Corporate Strategy Workplan – as of March 2021

**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.