



**SUBJECT: Burlington's 25-Year Strategic Plan Refreshed**

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

**FROM: Corporate Strategy**

Report Number: CS-08-21

Wards Affected: All

File Numbers: 155-03-01

Date to Committee: May 5, 2021

Date to Council: May 18, 2021

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**Recommendation:**

Approve the draft of One City, One Voice, One Vision: Burlington's Strategic Plan 2015-2040 (updated April 2021) as attached in Appendix A of corporate strategy report CS-08-21.

**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:**

The City of Burlington has been engaged in strategic planning since 1987. Throughout the years, four-year plans were created at the start of each council term. In 2015, Council supported the move to a 25-year horizon for its strategic planning and produced Burlington's Strategic Plan 2015 - 2040 (CM-01-16). The Strategic Plan has four key strategic goals:

- *A City that Grows* - where we see ourselves having attracted talent, good jobs and economic opportunity while having achieved intensification and a balanced, targeted population growth for youth, families, newcomers and seniors.
- *A City that Moves* - where we see people and goods moving through the city more efficiently and safely. And where a variety of convenient, affordable and green forms of transportation, aligned with regional patterns, are the norm. Where we see walkability within new/transitioning neighbourhoods and the downtown as the reality.
- *A Healthy and Greener City* - where we see ourselves as a leader in sustainability; stewardship of our environment, and healthy lifestyles.
- *An Engaging City* - where we see our community members engaged, empowered, welcomed and well-served by their city. Where we see culture and community activities thriving, creating a positive sense of place, inclusivity and community.

In addition, the plan contained a number of objectives, strategic initiatives and progress indicators under each strategic goal.

In 2018, the City introduced 2018-2022 Burlington's Plan: From Vision to Focus as the shorter, defined period plan to define the initiatives needed to accomplish the priorities and goals of the current Council – all aligned to the 25-year strategic plan.

Plans, whether strategic or tactical, require periodic review and refresh to take into consideration changing environments, economies and realities of the time. In 2020, the City initiated its review of the 25-year strategic plan and Vision to Focus (CM-08-20). With the onset of the pandemic and its continued impact, this review and refresh is taking longer than expected with revised timelines provided to Council throughout 2020 and into 2021 (refer CS-03-21 and CM-24-20).

### **Strategy/process**

Having a vision - a North star or a beacon – helps maintain the continuity in direction and supports consistency for our community, our residents and our staff. As an example, in the late 1960's, the Council of the day set a goal for a rural Burlington and throughout the years this vision has been maintained. Burlington's rural-urban boundary is a remarkable example of what vision does to maintain direction. In this case, despite external forces, despite changes, Councils - past and present - have kept that vision and made the short-term decisions necessary to keep us on track to that vision. In 2021, Burlington has a rural urban boundary because the council in 1969 had a vision.

Burlington's vision of where we want to be as a city and a community in 2040 was set out in 2015, and in 2021 it doesn't change dramatically. It is influenced periodically by what's happening in the environment, but it doesn't change significantly. What does change are the actions in the short term taking Burlington to the long-term vision.

### *Guiding Principles*

In starting the refresh and review of Burlington's Strategic Plan 2015 - 2040, the guiding principles include:

- the strategic directions and the future we aspire to will remain essentially the same.
- the aspirational goals identified in Vision to Focus absolutely connect to the vision of Burlington's strategic plan 2015 – 2040.
- acknowledging and understanding the top priorities of this council work to advance our progress toward the 2040 vision.
- the commitment to measure and track our progress towards our long-term vision.

### *Recommended Amendments, Refinements and Additions*

The following is a summary of the amendments, refinements and additions recommended for the refresh of Burlington's Strategic Plan 2015 – 2040. These recommendations capture the thoughts and observations of Council as expressed in the February 8, 2021 workshop. Vision 2040, the refreshed Burlington's Strategic Plan 2015 – 2040, is contained in Appendix A.

- Heading (title page)
  - Add “One City, One Voice, One Vision” to Burlington's Strategic Plan 2015 – 2040 to reflect the unity of the Council, community and the organization to the vision for the future.
  - Use “Vision 2040” as the shortened reference to “One City, One Voice, One Vision: Burlington's Strategic Plan 2015 – 2040”.

- Welcome to Burlington's 2015 – 2040 Strategic Plan - Update 2021 (page 2)
  - Added a paragraph under the title “2021 Strategic Plan reorganization and alignment with other City plans” to explain the update as a visionary document.
- Burlington's Strategic Plan and other Corporate Priorities (page 3)
  - Medium-term Policy Documents section
    - Addition of Burlington's Plan: From Vision to Focus
    - Renamed “Transportation Master Plan” to “Integrated Mobility Plan”
  - Short-term implementation plans
    - Addition of Annual Vision to Focus Action Plan
    - Changed City's Senior Management Work Plan to City Manager Objectives/Service Work Plans
    - Added “(operating and capital budgets)” to City's Financial Plan
- Burlington - Partnering for Success (page 4)
  - Addition of the acknowledgement of how our City proudly works with other levels of government to provide a suite of services to help us achieve our goals and support the 17 United Nations Sustainable Development Goals (SDG) to improve citizen well-being.

This addition is in keeping with the City of Burlington's recognition of the importance of the United Nations sustainable development goals (SDG) as expressed by Council during the February 8<sup>th</sup> workshop. With the UN's 2015 declaration, “The sustainable development goals are a call for action by all countries – poor, rich and middle-income – to promote prosperity while protecting the planet. They recognize that ending poverty must go hand-in-hand with strategies that build economic growth and address a range of social needs including education, health, social protection, and job opportunities, while tackling climate change and environmental protection. More important than ever, the goals provide a critical framework for COVID-19 recovery.” Quote from <https://www.un.org/sustainabledevelopment/>

As Burlington defined its vision for the future, a number of factors influenced, and continue to influence, the long term goals. Burlington's work to achieve its long-term vision align and support the SDG. Burlington's advocacy work for increased cooperation with and between Regional, Provincial and Federal governments, while not an aspirational goal, is a testament to Burlington's commitment to SDG #17 - strengthen the means of implementation and revitalize the global

partnership for sustainable development. Further analysis of how Burlington's long-term vision and goals support the SDG is contained in Appendix B.

- Corporate Alignment and Accountability (page 5)
  - Addition of this section to reiterate the importance of corporate alignment and accountability. This section explains how the vision for the city sets the priorities to focus our efforts and how the work of staff, through process operations and planning, deliver results. It is a framework for critical decision making and a guide to how resources are managed to position Burlington for the future. Burlington's corporate alignment and accountability is built on Service Management and Results Based Accountability (RBA) Frameworks. RBA is the work of The Fiscal Policy Studies Institute [www.resultsaccountability.com/](http://www.resultsaccountability.com/). This corporate alignment and accountability visual is also in Vision to Focus.
- Strategic Directions and Broad Objectives (pages 6 and 7)
  - The four strategic directions remain constant in the refreshed Vision 2040.
  - Update in "A City that Grows" to reflect the sentiment of this council by changing "intensification" to "community responsive growth" so that it reads:

"The City of Burlington attracts talent, good jobs and economic opportunity while having achieved community responsive growth and balanced, targeted population growth for youth, families, newcomers and seniors."
  - Update in "A Healthy and Greener City" to reflect the focus on mental health and wellbeing by adding "physical and mental" to the statement so that it reads:

"Better physical and mental health of residents to positively impact resiliency and quality of life".
  - Update in "An Engaging City" to reflect good governance by adding the statement "Residents are involved to enhance sound decision-making supporting good governance." so that it reads:

"Community members are engaged, empowered, welcomed and well-served by their city. Residents are involved to enhance sound decision-making supporting good governance. Culture and community activities thrive, creating a positive sense of place, inclusivity and community."
- Burlington - Our City, Household Characteristics (2016) and demographic changes (page 8)
  - Added a description of our city including household characteristics and demographic changes to provide some context for who Burlington is.
- Monitoring, Measuring and Reporting - The Road to Achieving Future Success (page 9)

- Added information to describe the monitoring and reporting required as this long-term strategy is a living document that requires review and refresh to consider and accommodate internal and external changes (e.g. global, regional, and city circumstances changing, events occurring, and other levels of government influencing, etc.).
  - Strategic Direction Details (pages 10 to 17)
    - Outcomes and Action Statements
      - Become more aspirational statements in Vision 2040 to define the vision as “We aspire to have...”.
      - A slight modification in “An Engaging City” to reflect the customer experience vision of this Council by including the aspirational statement that reads “in the future, we aspire to have a customer centric approach in all city service areas”.
    - Aspirational Goals
      - Not included in original Burlington’s Strategic Plan 2015 – 2040.
      - Aspirational goals were included in Vision to Focus and are being moved into Burlington’s Strategic Plan 2015 – 2040.
      - These aspirational goals have been reviewed and, where needed, revised to ensure relevancy and measurability. In some cases, further analysis is on-going and may result in additional changes to the aspirational goals. This type of review is consistent with our monitoring and measuring commitment.
      - Vision to Focus will continue to contain Achievable Performance Targets (4-year workplan) for each of the 11 priorities and goals.
  - Strategic Initiatives and Progress Indicators
    - These items have been removed from Vision 2040 as these are tactics whose outcomes are intended to advance the City’s progress to the aspirational goals. These tactics and their relevant measures are in the shorter, defined period plan of Vision to Focus.
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## **Financial Matters:**

The refresh of Burlington’s Strategic Plan 2015 – 2040 has not required any significant financial resources.

## **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 refresh.

### **Other Resource Impacts**

Involvement will be required from key stakeholders, such as Burlington Economic Development Corporation.

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### **Climate Implications**

Climate change is an important goal for Burlington and is embedded in each of the strategic directions. Actions and initiatives taken in the short- to medium-term are intended to demonstrate Burlington's commitment to climate action and adaptation.

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### **Engagement Matters:**

Council has been engaged in this refresh discussion through workshops. A small working team of City of Burlington and Burlington Economic Development staff have led discussions with staff to refresh and enhance the desired goals. Burlington's Leadership Team were provided with the refreshed Strategic Plan. Communications with our community and staff will introduce the refreshed strategic plan once confirmed by Council.

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### **Conclusion:**

With this refreshed Vision 2040, it sets the stage for further work and recalibration of Vision to Focus. It also provides a solid vision and aspirational goals as Vision 2040 one city, one voice, one vision paints the picture of what Burlington will be in 2040.

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Respectfully submitted,

Sheila M. Jones, CIA, CRMA

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**Appendices:**

- A. One City, One Voice, One Vision – Burlington’s Strategic Plan 2015 – 2040 Draft  
Updated April 2021
- B. One City, One Voice, One Vision: Burlington’s Strategic Plan 2015-2040 and the  
United Nations Sustainable Development

**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.