



SUBJECT: Approach and plan for updating the Vision to Focus Multi-Year Workplan 2022-26 and preparing for Vision 2050

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

FROM: Corporate Strategy

Report Number: CS-01-23

Wards Affected: All

File Numbers: 155-03-01

Date to Committee: March 1, 2023

Date to Council: March 21, 2023

Recommendation:

Receive and file corporate strategy report CS-01-23 containing the approach and plan for updating the Vision to Focus Multi-Year Workplan 2022-26 and the 25-year Vision 2050.

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

Background and Discussion:

The strategic planning process is used to set unified objectives and goals, prioritize efforts and ensure the organization is moving in the right direction to fulfill the long-term vision of the Council and Burlington Community. A strategic plan and the corporate workplan are not just documents, engagement events and identified initiatives but a living roadmap and process to consider and analyze ongoing organizational and situational opportunities and

threats in order to respond and plan appropriately. By using all of the following as inputs into the plan, the likelihood of the plan to create successful outcomes increases;

- data,
- research,
- partnerships,
- stakeholder engagement,
- past progress,
- real time updates,
- future goals,
- key decision making processes and
- operations processes.

Over the past 4 years, a regular cycle of review and refinement of both the City of Burlington's Strategic Plan - Vision 2015-2040 and Burlington's Plan: From Vision to Focus (V2F) have been endorsed and implemented. The following is an outline of key activities included in the regular cycle;

- a review of Vision 2040 provided the opportunity to consider current state and future trends in key areas, such as, economics, demographics, environment, and socio-economic, aspirational goals and high-level strategies, resulting in a refreshed 25-year vision for Burlington, Vision 2040.
- the annual re-calibration of V2F to prioritize resources, assess and mitigate risk, and ensure employees and other stakeholders are working toward common goals,
- establishment and implementation of an enterprise risk Governance framework, and
- establishment of accountability for V2F through regular reporting on progress to meeting key performance indicators and key target dates.

The processes and initiatives completed to date to refresh Vision 2040 were endorsed by Council through report CS-08-21 (May 5, 2021 Corporate Services, Strategy, Risk & Accountability Committee). The reporting and re-calibration of V2F was endorsed by Council through report CS-02-22 (February 2, 2022 Corporate Services, Strategy, Risk & Accountability Committee).

Strategy/process

By maintaining the cadence of review outlined in Appendix A page 1, and following a structured process including a critical milestone path, the Burlington Community, Council, Burlington Leaders and staff can anticipate the path forward and the project coordination involved for reviewing, refreshing and updating both the Long-Term Strategic Plan -

Vision 2040 in 2024 and Burlington's Plan: Vision to Focus (V2F) starting January 2023 and completed by Q2 2023.

Laying the ground work and outlining a multi-year plan is part of preparing the leadership and rest of the organization for what lays ahead in terms of engagement, planning, status reviews and resource commitment. Having a vision - a North star or a beacon pointing to the intended direction helps maintain the continuity in the direction and supports consistency for our community, our residents and our staff. A vision presents the ambition for the future that clearly describes the goals, dreams and aspirations for the city and its community. A vision should be reviewed on a regular predetermined cadence that allows for fresh, impactful and valuable information to be considered, such as economic and financial situations, environmental impacts, future and innovative market approaches and political, technical and social factors. Unpacking and reviewing a long-term vision too often can create confusion and poor performance. In addition, organizations that set a long-term plan and commit to translating the vision into multi-year plans sustain more performance improvement and achievements (Harvard Business Review – Keeping Sight of Your Company's Long-Term Vision, April, 2022).

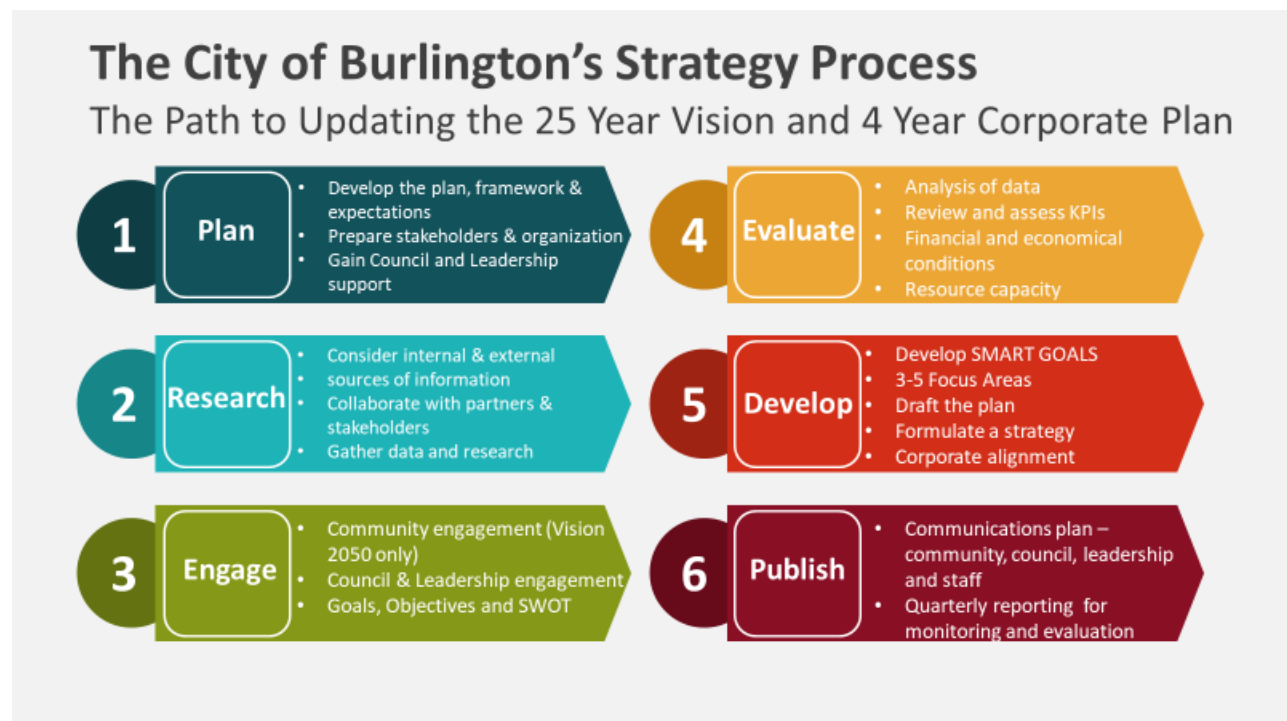
In Q1 of 2023, the final 2019-2022 V2F regular reporting on progress as of December 2022, will occur and the planning will begin for review and development of the next V2F multi-year corporate plan. In this next version of V2F, the intent will be to refine the key goals to 3-5 and solidify the headline measure that will help measure progress. In addition, the current inventory of corporate initiatives and major projects will be analyzed to understand items such as resource capacity, strategic long-term vision alignment and financial impacts, all to ensure that the output of V2F is a formation of a strategy and will get us closer to achieving Vision 2040. To guide the organization's executive level leadership - the Strategy and Risk Team (SRT), a process called corporate business planning and portfolio management has been designed and introduced; bringing a new systems-thinking approach in a holistic way to investigate factors and interactions that could contribute to possible outcomes. This process will help with corporate planning and decision making about project/initiative prioritization and execution. With this new systems-thinking approach, SRT will be able to provide, through evaluation and prioritization, a big picture perspective of the interactions, impacts and performance expectations collectively across the organization. Ultimately, this approach will help inform Council and the organization on the priority work being executed, with the objective of reaching the long-term visionary goals.

Using the corporate business planning and portfolio management system, the initiatives and project that make up the V2F Multi-year plan will have been strategically chosen based on resource capacity, financial analysis, stakeholder impacts, change capacity and

project sequencing. The guiding vision for this upcoming V2F Multi-year plan will be the current Vision 2040.

As indicated in Appendix A, The City of Burlington Critical Milestones, in 2024 a major undertaking to be incorporated into the portfolio management system will be the revisiting and revision of the 25-year long term vision to create Vision 2050.

Both processes will include the following activities; Plan, Research, Engage, Evaluate, Develop and Publish, as outlined below in Appendix A page 3.



The timeline for executing the V2F work will start in January 2023 and will use the support of an experienced strategic planning consultant and external facilitator to lead the stakeholder engagements and strategic planning processes. This approach will allow staff to manage items such as the project deliverables, Council and staff engagements and reporting, collaborative and inclusive collection of content, and alignment with corporate communications processes and practices. We are committed to ensuring the community is kept informed about V2F and engaged for Vision 2050.

Financial Matters:

Currently funding exists for Corporate Strategic activities and will include the procurement of a Strategic Planning Consultant and Facilitator for both the V2F project and Vision

2050 project. Also included will be the cost of communication tactics, which may include paid advertisements and minimal printing of final documents.

Additional internal costs will be consumed through the use of staff time. No dedicated staff team will be deployed for these project.

Total Financial Impact

Source of Funding

419200 – Strategic Plan cost center

Other Resource Impacts

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

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 and will be considered throughout the implementation of the V2F updating process and the development of Vision 2050. Options such as virtual meetings, electronic records and data as well as limited paper copy printing will all be considered.

Engagement Matters:

Both approaches to reviewing, creating and updating V2F and Vision 2050 will follow the IAP2 process of engagement and include the Corporate Engagement Team. V2F, the Multi-Year Plan, will be developed in consultation with Council, Burlington Leadership Team (BLT) and the Burlington Management Team (BMT). Vision 2050 will also consult with Council, BLT and BMT; however, the community and other stakeholders will be much more involved and consulted. Many types of workshops for Council, the community and staff will be hosted once the project plan for Vision 2050 has been established in January of 2024.

Conclusion:

Approving the Corporate Strategy report CS-01-23 containing the approach and plan for updating Vision to Focus Multi-Year Workplan 2022-26 and the 25-year Vision 2050 will

provide the organization with scope, intent and a path moving forward. This will also confirm the cadence of review and intent of both projects into the future.

Respectfully submitted,

Stephanie Venimore

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Appendices:

- A. CS-01-23 City of Burlington Critical Milestones Updating Vision to Focus and Preparing for Vision 2050

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.