



**SUBJECT:** Vision to Focus (V2F) The City of Burlington's 4-Year Workplan - Final Draft

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

**FROM:** Corporate Strategy

Report Number: CS-12-23

Wards Affected: All

Date to Committee: October 4, 2023

Date to Council: October 17, 2023

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### **Recommendation:**

Endorse the final draft of 2022-2026 Vision to Focus (V2F) The City of Burlington's 4-year Workplan contained in Appendix A of the corporate strategy report CS-12-23.

### **PURPOSE:**

To receive feedback from Council and make necessary adjustments to Appendix A 2022-2026 Burlington's Plan From Vision to Focus before publishing to the community and the organization.

### **Vision to Focus Alignment:**

- Designing and delivering complete communities in Burlington
- Providing the best services and experiences
- Protecting and improving the natural environment
- Driving organizational performance

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### **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, opportunities for engagement events, and a collection of identified initiatives but living roadmaps, workplans and processes used to consider

and analyze ongoing organizational and situational opportunities and threats in order to respond and execute appropriately.

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 most recent reporting and re-calibration of V2F was endorsed by Council through report [CS-06-23](#) (February 1, 2023 Committee of the Whole). This report and its [appendix](#) provided a year-end update including what was accomplished and how the key action created a positive outcome for the City.

### **Strategy/process/risk**

#### *V2F – The Process*

As outlined in report [CS-01-23](#), the process to develop V2F 2022-2026 included 6 phases (Plan, Research, Engage, Evaluate, Develop and Publish) which engage Council, executive level leadership - the Strategy and Risk Team (SRT) and Burlington Management Team (BMT). During this process, the current and future inventory of corporate initiatives and major projects were analyzed to understand items such as resource capacity, strategic long-term vision alignment and financial impacts. This analysis ensures the output of V2F is a formation of a strategy and it will get us closer to achieving Vision 2040.

To guide the Strategy and Risk Team (SRT), a process called enterprise business planning and portfolio management was designed and introduced; bringing a new 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 approach, which is now called the EPP process, SRT was able to provide, through evaluation and prioritization, a big picture perspective of the interactions, impacts, risks, and outcome expectations collectively of projects and initiatives across the organization.

Using the EPP process, the initiatives and projects that make up this V2F workplan have been identified through the organization's many Master Plans and Department Strategies. The V2F work planning process took into consideration resource capacity, financial analysis, stakeholder impacts, change capacity and project sequencing. The guiding vision for this V2F workplan has been the current Vision 2040. However, it is important to note the major focus of this workplan is to be a community with the highest quality of life where people choose to live for multiple generations. This focus area is in alignment with recent legislative changes, impacts from other levels of government, and

a strong commitment from Council and City Leadership on planning for Burlington's future.

#### *V2F – The Format*

Appendix A contains the final draft of 2022-2026 Vision to Focus. V2F is designed to be an easy-to-follow workplan. Inclusive of the City Leadership Commitment, V2F provides a profile of the Burlington Community and City demographics and an overview of the organization's values and enabling behaviours supporting organizational success.

V2F has 4 focus areas:

- Designing and delivering complete communities in Burlington
- Providing the best services and experiences
- Protecting and improving the natural environment
- Driving organizational performance

Each focus area has defined objectives to demonstrate what is expected to be achieved through our commitments, outcomes to understand when we have achieved success, and key actions to be taken to achieve the objectives and deliver the outcomes.

#### *V2F – Measuring Progress*

A new section in this V2F identifies how focus on achieving the objectives of each area creates a positive impact on the quality of life, sense of belonging, health and social well-being of the Burlington community. It is important to make this connection between the work we do and Burlington's long-term vision: Burlington is a place where people, nature and business thrive.

This section demonstrates the measures to be used to monitor and report on the progress to achieving the outcomes. These measures help us understand the impact on the community (Is anyone better off?), the City's service performance and processes (How much did we do? How well did we do it?) and lastly, overall organizational performance measures. All of these measures align to reflect the progress of the City's long term vision.

The measures identified indicate those that are directly related to an organizational key target/goal or outcome. It is important to note, in some cases the measures require additional review to determine the need for a multi-year target and/or confirm the source and accuracy of data supporting the measure.

#### *V2F – Appendix A: Action Plan at a Glance*

The final section of V2F contains a summary listing of the actions including the lead department and the target date for completion. These actions come from major corporate projects, initiatives, studies, plans and reports that are all of a time sensitive nature and that will significantly advance the organization towards the 25-year long-term strategic vision.

As progress is measured and tracked, these actions and dates may need be adjusted to reflect the realities of changes such as: global, regional and city circumstances, major events, and other levels of government. As the work plan is reviewed annually, recalibration, as needed, will occur. This recalibration will also consider any amendments needed as a result of the update to the City's 25-year strategic plan: Vision 2050.

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### **Financial Matters:**

The costs to develop V2F include Council and staff time in addition to the costs associated with communication tactics (e.g., paid advertisements, printing, etc.).

### **Total Financial Impact**

Outside of internal staff time, costs to date have been minimal.

### **Source of Funding**

Funding is provided through operating base budget.

### **Other Resource Impacts**

Involvement was required from key stakeholders, such as Council, Burlington Leadership Team, Corporate Strategy Team, Finance and Corporate Communications and Engagement Team.

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### **Climate Implications:**

Climate change is an important goal for Burlington and in this V2F workplan has become a focus area. This focus area called "Protecting and improving the natural environment" draws attention to the objectives, intended outcomes and actions that are needed over the next 4 years to make an impact on meeting the goals in Burlington's commitment to climate action and adaptation.

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## **Engagement Matters:**

Over the course of the Spring and Summer 2023, multiple sessions were held for consultation, input and feedback that contributed to the content development and design of this workplan. These engagement sessions occurred with Council, executive level Leadership (SRT), Burlington Leadership Team (BLT) and the Burlington Management Team (BMT). Through these sessions, the themes of the focus areas were discussed and enhanced to align with Council's desired outcomes for this term of Council and for the long-term vision of the Burlington Community.

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## **Conclusion:**

This workplan gives staff guidance on what actions to focus time and attention towards, the goals to strive for and the desired outcomes ultimately we want to achieve for the Burlington community. Council's comments and feedback on 2022-2026 Burlington's Plan From Vision to Focus are important. We are seeking endorsement of this final draft along with your comments so the final version of 2022-2026 V2F Workplan can be published and measuring, monitoring, and reporting commenced.

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Respectfully submitted,

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## **Appendices:**

A. 2022-2026 Burlington's Plan From Vision to Focus – Final Draft

## **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.