



SUBJECT: Update on organization's strategy and business planning process

TO: Committee of the Whole

FROM: Corporate Strategy

Report Number: CS-09-24

Wards Affected: all

Date to Committee: December 2, 2024

Date to Council: December 10, 2024

Recommendation:

Receive for information corporate strategy report CS-09-24, an update on the organization's efforts to date, and the approach and plan for corporate strategy development and alignment of business planning processes into 2025.

PURPOSE:

Vision to Focus Alignment:

- Designing and delivering complete communities
 - Providing the best services and experiences
 - Protecting and improving the natural environment and taking action on climate change
 - Driving organizational performance
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Executive Summary:

The City of Burlington has adopted a comprehensive and forward-thinking approach to strategy and work plan development, as detailed in 2022-2026 work plan, "Burlington's Plan: From Vision to Focus - V2F". This work plan serves as a roadmap to achieve the long-term objectives outlined in the city's 25-year strategic vision, "Vision 2040." By aligning short-term actions with long-term goals, Burlington aims to effectively manage and plan for growth, enhance community services, address environmental and climate challenges, and drive organizational effectiveness.

In Q4 of 2024, the organization, through the guidance of Executive Leadership, has prioritized refining objectives, key performance indicators (KPIs), and strategic outcomes that directly support the goals of the four V2F pillars. This foundational practice will determine the current baseline and identify improvement opportunities.

Continuing to make significant efforts in advancing enterprise strategic and business performance management, the initial development of a project plan for a refreshed Burlington long-term 25-year vision; Horizon 2050 has started. A refreshed look at the next 25-year horizon of the City of Burlington will ensure the Council, the community and the organization are all aligned in a clear direction and purpose.

Background and Discussion:

In Q4 2024, the City of Burlington transitioned from the previous business performance practices to a more structured, collaborative, and strategic approach, led by Burlington's Executive Leadership Team. A key driver in this transition was the organization's re-structure and budget by department re-alignment. This shift involved implementing a standardized framework for setting priorities, objectives, and key performance indicators (KPIs) to enhance decision-making and resource allocation. By aligning these elements with the four pillars of the Vision to Focus (V2F) plan, the city aims to improve accountability, foster collaboration, and ensure that all departments work cohesively towards common outcomes. Fundamentally, this approach enables leadership to effectively cascade priorities, create synergies, promote cross-functional collaboration, and minimize potential conflicts, ensuring resources are optimally aligned to support a unified and efficient path toward achieving the organization's priorities.

Strategy/process/risk

The roll out of all the components within the Integrated Model – Future State (Appendix A), will be sequentially implemented to ensure structured progress, iterative optimization, and stabilized alignment.

A sequential approach simplifies efforts and organizes information by building on content from the previous component. This allows for each team to understand and adapt their efforts to the evolving strategy, ensuring that all areas are moving coordinated toward the same organizational goals and clarifies ownership at every level. The intent is to foster a sense of responsibility and commitment to achieving the determined outcomes. This approach will also enhance all levels of stakeholder engagement as sequential roll out provides clear checkpoints, making it easier to communicate progress and involve stakeholders (such as council members, partners, the community and city leadership and

staff) at key points in the model, helping maintain transparency, gather feedback, and adjust to stakeholder needs over time.

Horizon 2050

The Horizon 2050 initiative outlines Burlington's vision for the next 25 years, aiming to support unprecedented growth while maintaining the high quality of life that makes Burlington a top city to live and work in Ontario. With a projected population increase of 40-60% from 2021 to 2051, Horizon 2050 addresses the need for a long-term vision with a goal of sustainable development, high service standards, and a cohesive identity for Burlington.

Horizon 2050 expands on Burlington's 2040 Vision by forecasting socio-economic growth and its impacts. This work will also include a five-year strategic plan with aligned clear priorities and objectives and a new Burlington brand strategy. For the first time all three components of the strategy development (Vision, Strategic Plan and Brand Strategy) will be pulled into a unified, single cohesive approach.

This approach includes:

- A long-term vision with a 5-year Strategic Plan, including key priorities and KPIs.
- A brand platform to highlight Burlington's unique characteristics, differentiating it as a desirable place for residents and businesses.
- Focused consultations involving key stakeholders like City Council, local businesses, community members, and external experts.

A future report and workshop about the Horizon 2050, 5 Year Strategic Plan and Burlington Brand Strategy with a project outline, key milestones, the engagement plan (including Council engagement plan) will be provided to Council in Q1 2025.

Other Supporting Strategic Alignment Activities

Business Area Review Team

To further enable the organization to visualize, track, monitor and enhance data driven decision making, a structured team of business area leaders across the organization has been recently formed. B.A.R.T. (Business Area Review Team) has prioritized building a long-term, strategy-focused culture, with early identification of at-risk initiatives and alignment with resource planning. This team will enhance cross- departmental collaboration, transparency, and alignment to achieving the strategic priorities. There will

be regular reviews of KPI status, project synergies identification and focus on reducing duplicate efforts and addressing potential conflicts in resource allocation.





Corporate Dashboard

A corporate dashboard serves as a digital tool to track, monitor and report city-wide performance metrics, and enhance transparency and accountability. The dashboard will allow city leadership, council members, and potentially the public to see how Burlington is progressing toward its strategic priorities, corporate projects, and the status of achieving KPI targets. Testing has begun with the current minimal viable product (MVP), with a targeted go live of Q1 2025.

As part of a phase 2 for the Corporate Dashboard implementation (Q3 2025), corporate projects will be aligned to the objectives and key priorities, driving overall success, and ensuring that each initiative contributes meaningfully to the priorities of the organization. Regularly tracking project status provides insight into whether the project is progressing as planned in relation to strategic objectives. This visibility makes it easier to identify when a project is deviating from expected timelines or outcomes. Furthermore, when status updates reveal delays or issues, teams can quickly adjust or allocate additional resources, keeping the project aligned with priorities and reducing the risk of failure and therefore driving success.

Past practice to report on Corporate Strategic Projects has been a manual process as per the last Report CM-05-24. The future plan, as mentioned above, is to optimize the process through the corporate dashboard. To date 2 projects included in the last Corporate Projects Status Update have been shifted to operations and closed as projects. The chart below is a high-level status update for the projects included previously for these updates. In the new process, projects that advance the strategic direction of the organization will be included and the alignment to organizational priorities will be identified. This new reporting process will begin in Q3 2025 in phase 2 of the corporate dashboard project and will no longer be a manual reporting process but will use technology to visual and track corporate project statuses.

Overview of 2024 Project Status Updates

Automated Vehicle Locator (AVL)				
Reported By: Ron Sangle PM/Fleet BIS and Paul Swioklo, Fleet Manager RPF				
Health Check				Overall
Scope 	Schedule 	Budget: In Year 	Budget: Future 	Closed
Status Update and Plan to Green				
<ul style="list-style-type: none"> This project is substantially complete. As of April 2024, ALL departments inside and outside RPF have completed ELD (Electronic Logging Device) training. 				

- All departments have implemented and rolled out the Focus S app for light duty and heavy duty* inspections [266 vehicles, 344 users] *Effective November 15th.
- A custom API developed for the City of Burlington was completed in August 2024. With this system, management reports will be produced that highlight KPIs for driver behavior, visits outside designated zones, vehicle utilization, idle time, and fuel efficiency metrics.

Performance Development & Growth				
Reported By: Linda Ljucovic, HR Consultant, Organizational Development and Sue Evfremidis, Chief Human Resources Officer				
Health Check				Overall
Scope G	Schedule G	Budget: In Year G	Budget: Future G	G
Status Update and Plan to Green				
<ul style="list-style-type: none"> • Implementation of entire process for all non-union staff, providing support in time for skills application on target for expected completion December 2025. • Pilot group (30 people leaders) participated in learning sessions aimed at developing skills in goal setting, facilitating performance and development conversations, and in evaluating and recognizing performance. • A newly designed 2024 Performance Review Form was launched to capture 2024 performance for non-union full-time staff. • The system, Workday, that will support the new process in 2025 was configured, tested, and moved into production. 				

Enterprise Asset Management System (EAMS)				
Reported By: Brian Giswold, Project Director				
Health Check				Overall
Scope G	Schedule Y	Budget: In Year G	Budget: Future G	Y
Status Update and Plan to Green				
<ul style="list-style-type: none"> • Multiple key achievements occurred since the last reporting cycle. Some include, implemented new project governance model (Delivery, Project Leadership, Sponsors, Steering Committee), developed/approved project implementation strategy and project plan and completed integration discovery between Cartegraph and Workday. • Implemented stakeholder engagement, business area process and solutions design and started operational requirements planning. • Key actions planned for next quarter are to initiate Workday-Cartegraph integration development and testing, finalize project timeline based on integration work impacts, continue with business area process and solution design. • Finalizing the project schedule based on the timeline required to complete the Workday-Cartegraph will provide the certainty needed to make the schedule green. 				

Enterprise Resource Planning (ERP) Workday				
Reported By: Ade Ogunkoya, Product Manager				
Health Check				Overall
Scope G	Schedule G	Budget: In Year G	Budget: Future N/A	Closed
Status Update and Plan to Green				
<ul style="list-style-type: none"> • Official Global Launch - Enabled COB employees to access Workday on Sunday, February 25, 2024 • Identified 2024 Product Goals: Focus on product stabilization, build internal knowledge and capacity, and enhance user experience. • Benefit realization exercise will occur at 1year postproduction and the establishment of a benefit baseline for future benefit realization exercise. 				
Key Achievements				

- Data Consolidation: Centralized data from multiple systems into a single data repository.
- Process Automation: Reduced manual processes and minimized human error through automation.
- Self-Service Capabilities: Empowered employees with various self-service options to increase efficiency and accessibility

Next Generation 9-1-1 (NG 911)								
Reported By: Deputy Fire Chief Boys, Joke Guthrie, Project Manager								
Health Check				Overall				
Scope	G	Schedule	Y	Budget: In Year	G	Budget: Future	Y	Y
Status Update and Plan to Green								
<ul style="list-style-type: none"> • Expected completion date Q1 2025. • Core NG911 hardware installed, validated operational, remaining components received. • Secured \$1.1M Year 2 provincial funding. • Successful bringing Solacom Demo System onsite at Burlington Fire Department, Technical & Communications Teams trained on the system. • Schedule (yellow) Plan to Green: closely monitoring vendors and regional partner timelines and commitments, escalating where/when encountering delays. To date escalations have been heard, actioned, met with success. • Budget Future (yellow) Plan to Green: All operating and capital budget requirements will be provided as part of the regular budget process for Council consideration. 								

In addition, the Corporate Dashboard will be fundamental to the operations of the B.A.R.T., as it will be the tool used to monitor results, drive discussions, lead decision making and make real time adjustments in operations and corporate strategic projects.

Financial Matters:

Source of Funding

Funding for all activities has been budgeted in the City’s operational budget, and funds not used in 2024 will be carried into 2025.

Other Resource Impacts

Administrative support, time spent in meetings, and staff hours dedicated to coordination, play a crucial role in ensuring the success of Burlington’s strategic planning and business performance initiatives, even though they may not be directly tied to project deliverables. These indirect costs add value to the program by enhancing coordination and alignment minimizes redundancies, identifies synergies, and ensures resources are deployed efficiently, reducing the risk of conflicting efforts or duplication. In addition, staff time dedicated to internal reporting and accountability checks allows for transparent progress tracking. These indirect tasks reinforce accountability by documenting achievements and areas needing improvement, ensuring adherence to the plan.

Climate Implications:

The implementation of these strategy and business planning processes, can act as a catalyst for integrating climate action into Burlington's strategic framework, leading by example in sustainable practices, and setting up mechanisms to measure and report progress. Examples of how climate implications will be considered include.

1. Supporting the development of environmental goals and metrics
2. Advocating for sustainability in projects and operations
3. Driving innovation in climate change solutions
4. Monitoring and reporting environmental impacts.
5. Creating strategic alignment with climate goals.

This approach not only advances environmental stewardship but also positions Burlington as a forward-thinking city committed to a sustainable future.

Engagement Matters:

Several key engagement matters need careful consideration to ensure effective communication, alignment, and support from all stakeholders.

A stakeholder identification and inclusion plan for each component of the Integrated Model will be developed to identify relevant stakeholders to reflect a range of perspectives. As each component of this plan rolls out key checkpoints with leadership and staff will occur for review, asking for feedback to refine and evolve processes and approaches. As necessary learning and development opportunities will be provided to stakeholders, leadership, and staff to ensure understanding of the benefits and mechanics of organizational performance.

Conclusion:

This outline demonstrates the organization's commitment to enhancing structured, data-driven performance management, positioning the city for long-term success and accountability through a unified strategy and effective resource alignment.

Respectfully submitted,

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Appendices:

A. Integrated Model – Future State

Report Approval:

All reports are reviewed and/or approved by Department Director, the Chief Financial Officer and the Commissioner Legal and Legislative Services/City Solicitor.