
SUBJECT: Burlington's strategic planning approach
TO: Committee of the Whole
FROM: Transformation Office
Corporate Strategy and Business Improvement
Report Number: TRN-01-25
Wards Affected: All
Date to Committee: April 7, 2025
Date to Council: April 15, 2025

Recommendation

Approve the City's recommended strategic planning approach as outlined in transformation office report TRN-01-25.

Executive Summary

Burlington is undergoing an internal strategic realignment. A shift from the Service Based Vision to Focus ensures that the City's long-term direction reflects current realities and emerging opportunities. Transitioning from Vision 2040 to Burlington's 25-Year Strategic Plan (formerly named as Horizon 2050 in report [CS-09-24](#)) is rooted in the need for a modernized, community-driven approach that aligns to Burlington's vision within the context of the current and future evolving demographic, political, economic, and environmental conditions.

Purpose of report:

The purpose of this report is to update Council on the strategic planning approach, progress made to date, and next steps in developing Burlington's new 25-year long-term strategic plan. This plan, set to refresh Vision 2040, will serve as the City's foundational roadmap for guiding decision making around growth, sustainability, service delivery, and governance over the coming decades.

Key findings:

1. Internal Corporate Strategic Realignment
 - The new corporate strategy emphasizes a shift from a service-based model to a division- and department-focused approach for better alignment and execution.

2. The Approach is an Integrated Three-Part Strategic Framework.
 - The planning approach consists of three interconnected components:
 - 25-Year Strategic Plan – Long-term vision and direction.
 - 5-Year Corporate Strategy – Focused objectives, priorities, and KPIs.
 - Brand Strategy – Plan for expressing the City’s vision, priorities, and differentiators through branding.
3. Emphasis on Enhanced Performance Management System
 - The City is using a Strategic Management and Performance System Cycle (Appendix A), incorporating:
 - Divisional objectives, performance indicators, and performance targets.
 - A newly launched Gen 1 Corporate Dashboard performance monitoring.
4. Elevated Corporate Strategic Focus
 - Defined four strategic directions which guide the corporate strategy
 - These directions align with a Balanced Scorecard Approach, ensuring focus on community, financial stewardship, internal processes, and workforce development.

Implications:

- Financial Implications
 - Investment in project execution including engagements, consulting services, and product development
- Human Resources & Organizational Change
 - Critical to ensure adoption of the new strategy.
- Governance and Transparency Considerations
 - Improved governance frameworks and accountability measures
- Communications & Public Engagement
 - Ongoing engagement with the community and Council

Recommendation Report

Background

Outline of Burlington's Strategic Planning Approach:

The approach consists of three interconnected components:

1. Burlington's 25-Year Vision and Strategic Plan
 - Assess, analyze, engage and deliver a future outlook plan based on the socio-economic forecast for Burlington over the next 25 years.
 - This includes comprehensive community engagement, Council leadership and input, and internal and external data analysis.
 - It focuses on defining the city's long-term vision, priorities, and key directions.
 - The goal is to ensure Burlington remains resilient, future-ready, and sustainable while reflecting the needs of the community and evolving challenges over the next 25 years.
2. The 5-Year Corporate Strategy
 - The Corporate Strategy is a series of focused strategic choices, priorities, service promises, and Key Performance Indicators (KPIs) bringing us closer to achieving the 25 Year Plan.
 - This component has been realigned from Vision to Focus (V2F) to a refreshed corporate strategy, shifting from a service-based approach to a division- and department-based approach.
 - This ensures strategic alignment across City divisions and departments, improves operational decision-making, and reflects changes in budget allocations.
 - This is where Burlington's strategic directions, perspectives, and objectives reside, driving organizational performance and accountability over a 5-year period.
3. Brand Strategy
 - A new brand strategy and implementation roadmap will be developed to align all stakeholders with a City of Burlington brand promise, positioning, differentiators, character, and architecture (a map of how the City's brand exists in relation to the ABC/JV and partner sub-brands).
 - The brand strategy will be the public expression of the strategic plan's core principles, delivered through marketing, communications, and design elements.
 - This brand strategy will be developed with robust engagement across all stakeholder groups, including staff, partner organizations, Council, and the community. It will build on insights and engagement done in previous phases of the strategic planning initiative.

- It is important to acknowledge that Burlington Economic Development and Tourism are leading the Destination Brand Project (a separate initiative) - focused on telling Burlington's story as a place to visit, experience, and invest in. City staff will continue to consult with Burlington Economic Development and Tourism on the Destination Brand Project.

Expected Outcomes:

- **Increased Community Alignment:**
A shared vision and identity that fosters pride and engagement among residents and businesses.
- **Economic Growth:**
Improved ability to attract businesses, entrepreneurs, and tourists.
- **Enhanced Reputation:**
Burlington will stand out regionally and nationally as a dynamic, sustainable city.
- **Internal Cohesion and Performance Accountability:**
Departments and stakeholders will operate under a unified framework, improving efficiency, and collaboration.

To ensure an effective, impactful, and sustainable long-term strategy, the Brand Strategy project will be executed in parallel with the 25-year Vision and Strategic Plan. When executing a long-term strategic plan, a strong brand strategy ensures alignment, consistency, and meaningful stakeholder engagement. The Brand Strategy is also crucial for long-term execution as it helps to remind internal staff teams about the organization's purpose and mission. In addition, a Brand Strategy can strengthen the City's Vision by attracting new partnerships, potential investors, and talent to the city. As demonstrated in Diagram B below, all three components of Burlington's Strategic Planning Approach work together to complement, align, and deliver the commitments made to the Burlington Community.

Diagram A



Analysis

With the Corporate Strategy near complete and the internal corporate dashboard launched, the organization is internally ready to lead Burlington's 25-year Vision and Strategic Plan. By following the Strategy Management Performance System Framework (Diagram B), all elements of both the 5-year Corporate Strategy and 25-year Vision and Strategic Plan will be aligned and integrated. After the 25-year Vision and Strategic Plan is finalized, there will be a period of adjustment to make sure that the organization's strategies and objectives align with and support the plan's advancement.

RECOMMENDED: Option 1

Endorse and approve Burlington's Strategic Planning Approach.

Benefits: A comprehensive and future ready plan with the community and Council's aspirations for growth, sustainability and long-term quality of life

Considerations: Wide range of participation needs (Council, community, community partners, leaders, and staff).

Additional Information: Council and leadership focus on joint decision-making and collaboration will be essential to meeting project timelines.

Community Engagement and Communications: Wide reaching community engagement and communication is necessary

Option 2

Deconstruct the plan and approve only component parts

1. 25 Year Vision only
2. 25 Year Strategic Plan only
3. 5 Year Corporate Strategy only
4. Brand Strategy only

Benefits (while not recommended): Less utilization of resources (Council, community and staff time).

Considerations: This option may create a disconnected plan and if not completed in 2025, the next available window of time will not be until 2027 due to the 2026 Municipal election.

Recommendation Details

This recommendation works to ensure the City remains resilient, accountable, and adaptable in an evolving landscape, with a clear strategic vision, operational execution framework, and unified Burlington narrative. Endorsing this plan will set the foundation for a consistent and structured approach to addressing the City's Strategic Planning process. This will lead to greater long-term success and reduce fragmented planning, ensuring cohesion across city divisions and departments.

Key Dates & Milestones

The following are projected timelines, a project outline, and key activities for Burlington's Strategic Planning Approach.

March-June 2025	<ol style="list-style-type: none">1. Project Initiation: Council Update, consultant selection, project launch and environmental assessments and data gathering2. Engagement Plan Development: Define stakeholders and engagement design3. Engagement Launch: Council strategy Workshop and community engagement (surveys, focus groups, and workshops)
June-September 2025	<ol style="list-style-type: none">4. Content Review, Integration and Development: Vision development, testing and modeling, strategy formulation and strategic plan development, Council update and continued Brand Strategy development
October-November 2025	<ol style="list-style-type: none">5. Document Development: Brand Strategy, implementation roadmap and strategic plan creative development

December 2025 – Jan. 2026	6. Launch – Council presentations, staff communications and public marketing and communications campaign
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Implications

Financial Implications

- The transition from Vision 2040 to a refreshed strategic plan requires investment in performance tracking, engagement, and branding efforts. Project Capital funding is allocated in the 2025 budget at \$150,000. Consulting services will be utilized for both the Strategic Plan and Brand Strategy development.
- Staffing resources will have additional commitments to support project work.
- Budget priorities and investments in 2025 should align to reflect priorities, aligned strategic initiatives, and necessary technology advancements.

Human Resources & Organizational Change

- Re-alignment of priorities and identification of gaps in business performance may require increases in people capability and/or capacity.
- Training and leadership development are critical to ensure adoption of the new strategy.

Governance and Transparency Considerations

- Improved governance frameworks and accountability measures will enhance transparency and regulatory compliance.

Communications & Public Engagement

- The Brand Strategy will play a key role in public perception, stakeholder trust, service promises and clarity of messaging. A robust engagement will contribute to inclusivity and broad support, fostering alignment among stakeholders. A fulsome engagement plan will be developed as part of project planning.
- Ongoing engagement with the community and Council will ensure that the final plan reflects community needs and expectations

References

[Report CS-09-24 Update on Organization's Strategy and Business Planning Process](#)

Strategic 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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Appendices:

A. Strategic Re-alignment Activities and High-level Corporate Strategy Content.

Report Approval:

All reports are reviewed and approved by the Commissioner, Head of Corporate Affairs, Chief Financial Officer, and Commissioner of Legal and Legislative Services/City Solicitor.