



REPORT

Special Council

Meeting Date: May 17, 2023

FROM: Strategy, Policy and Communications Department

DATE: May 11, 2023

SUBJECT: Council Strategic Plan and 2023–2026 Business Plan – Strategic Planning Session #2

LOCATION: Town Hall

WARD: Town-wide

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RECOMMENDATION:

1. That the report titled Council Strategic Plan and 2023–2026 Business Plan – Strategic Planning Session #2, from the Strategy, Policy and Communications department, be received.
2. That the draft Strategic Plan Framework be endorsed in principle, including the Vision, Mission, Guiding Principles, Strategic Priorities, and Strategic Objectives, subject to additional Council input and community and stakeholder feedback.
3. That staff report back to Council on June 19, 2023, with an updated draft Council Strategic Plan and 2023–2026 Business Plan including actions and initiatives.

KEY FACTS:

The following are key points for consideration with respect to this report:

- A comprehensive approach has been undertaken in the development of an updated long-term vision, strategic plan and associated four-year business plan (the “Strategic Plan”), with a process that includes visioning, strategic planning, public sector market research, continuous improvement and innovation, and engagement.
- Extensive stakeholder engagement and community consultation has been undertaken to gather input and ensure the strategic plan is reflective of what the community sees for the future. Results from the engagement process are included in this report in Appendix A.

- Other results that have informed the strategic planning process include: the Global Scan (Appendix B) and the Oakville Community Profile (Appendix C).
- This report brings forward an initial draft of the new Strategic Plan framework in Appendix D for consideration, discussion, evaluation of options, and endorsement in principle.
- The public and stakeholders are invited to provide initial feedback, with a view to an updated draft strategic plan framework and business plan (with identified actions and initiatives) to be presented to Council on June 19, 2023, for further discussion and endorsement.
- There will be a formal two-week review period in June 2023, and the final Strategic Plan will be presented to Council on July 11, 2023, for approval.

BACKGROUND:

Establishing a long-term vision, strategic plan and four-year business plan is one of the most important responsibilities of Council. It establishes Council's vision, mission and values and sets the strategic goals that serve as the framework for both Council decision-making and day-to-day employee choices.

Current Strategic Plan

Council adopted the following vision, mission and values in 2007, which have driven Council's priority setting since that time.

Vision: To be the most livable town in Canada.

Mission:

- We create and preserve Canada's most livable community that enhances the natural, cultural, social and economic environments. We achieve this by continuously improving programs and services that are both accessible and environmentally and fiscally sustainable.
- We are highly valued and widely celebrated due to the innovative and outstanding way we satisfy the needs of our residents, businesses and employees. As a result, the process is as fulfilling as the outcome.
- We ensure our staff receives the same level of respect, commitment and care that they are expected to deliver to the community.

Values:

- **Accountability:** We deliver what we promised. We are accountable for our own actions and results. We are accountable for the efficient and effective use of public funds
- **Dedication:** We willingly take on responsibility. We are committed to serving our community. We take initiative and we take on our share of the work.

- **Honesty:** Each of us demonstrates personal integrity, truthfulness and honesty in how we do our job. We inspire public confidence and trust in our government.
- **Innovation:** We pursue innovation by being creative, showing initiative and taking risks. We encourage employees to exercise judgment in meeting customer needs.
- **Respect:** We value an open, respectful and inclusive workplace. We value the cultural and social diversity of our community. We make it possible for every resident to participate in our community, and in our government.
- **Teamwork:** We act as a team. We demonstrate high levels of trust and cooperation. We collaborate across departments to achieve our goals. We work in partnership with our community.

Since 2007, Council has met annually to review and measure progress being made to achieve these key strategic priorities. They drive the town's annual business planning and budgeting process, which ensures departmental initiatives are aligned with Council's strategic priorities.

On April 29, 2019, Council approved its 2019–2022 Council Strategic Plan with five strategic areas of focus to guide decision-making for that term of office:

- **Livability:** To be the most livable town in Canada
- **Engaged Community:** Foster a community environment that engages residents of all ages, abilities and backgrounds
- **Accountable Government:** Inspire public confidence through open, accountable and efficient delivery of government services
- **Mobility:** Improve town's multi-modal transportation network to support effective movement of people and goods
- **Environment:** Protect greenspace and promote environmentally sustainable practices

On May 25, 2021, Council approved its 2019–2022 Council Strategic Plan Refresh. The above five strategic areas of focus were maintained by Council, but the Refresh incorporated several additional initiatives and included six priority areas: the Halton Region Official Plan and Livable Oakville Reviews; creation of a Pandemic Recovery Plan; addressing traffic, speeding and safety; reducing timeframes for applications, permits and licenses; enhancing communications; and implementing capital projects.

New Council Strategic Plan and 2023–2026 Business Plan

Staff has taken a comprehensive approach to support the 2023–2026 Council in the development of an updated long-term vision, strategic plan and associated four-year business plan, including arranging for innovative opportunities to integrate learnings and best practices from other jurisdictions.

In preparation for this work, staff has engaged Deloitte LLP who was selected through a competitive request for proposals process. Deloitte is a well-known leader in public and private sectors globally with expertise in visioning, strategic planning, public sector market research, continuous improvement and innovation, and engagement.

Council Sessions

On March 7, 2023, Andy Potter and Sarah Lewis from Deloitte facilitated Council's primer session at a public Special Council meeting. The primer helped to set the foundation for the strategic planning process, including an overview of the strategy development, workplan and approach to engagement.

On March 31, 2023, the Deloitte Greenhouse Experience Program was conducted in Toronto—in a closed session as permitted under s.239(3.1) of the [Municipal Act](#), 2001, S.O. 2001, c. 25—as part of an innovative and future-focused incubator experience for Council. This workshop encouraged creativity in strategic planning and flexibility in future visioning for the community.

On April 27, 2023, Strategic Planning Session #1 was conducted for Council, through a closed session, engaging and collaborating with the Executive Decision Centre (EDC) at the Smith School of Business at Queen's University, facilitated by Erik Lockhart, Senior Facilitator, President, Lockhart Facilitation Inc. This session had a focus on the four-year business plan and the development of strategic priorities to align with the town's long-term vision.

Engagement Efforts

Throughout March and April 2023, stakeholder engagement and community consultation—with residents, businesses, community partners, and staff—was undertaken in an effort to gather input and ensure the strategic plan is reflective of what the community sees for the future and what actions need to be taken to ensure Oakville continues to be one of the best places to live. The following are highlights of the engagement efforts completed:

- Open houses in each of the seven wards, with 75 attendees in total who provided written and verbal comments or completed surveys, at the following sites:
 - March 28, 2023: Oakville Trafalgar Community Centre
 - March 29, 2023: River Oaks Community Centre

- March 29, 2023: Iroquois Ridge Community Centre
 - March 30, 2023: Sixteen Mile Sports Complex
 - March 30, 2023: Trafalgar Park Community Centre
 - April 5, 2023: Glen Abbey Community Centre
 - April 5, 2023: Queen Elizabeth Park Community and Cultural Centre.
- Online and phone surveys open from March 20, 2023, to April 10, 2023:
 - 401 completions of the telephone survey, satisfying the target of 400 completions.
 - 2041 completions of the online survey, exceeding the target of 400 completions.
 - Interviews or focus groups with key groups of stakeholders, including each Member of Council, the Oakville Chamber of Commerce, Accessibility Advisory Committee, Canadian Caribbean Association of Halton, Halton Equity Diversity Roundtable, Halton District School Board, Halton Environmental Network, Halton Interfaith Council, Haltech, HMC Connections, Oakville Arts Council, Oakville Community Foundation, Oakville Galleries, Oakville Historical Society, Oakville Public Libraries, Oakville Youth Action Committee, Seniors Working Action Group, Sheridan College, Sport Oakville, and YMCA of Oakville

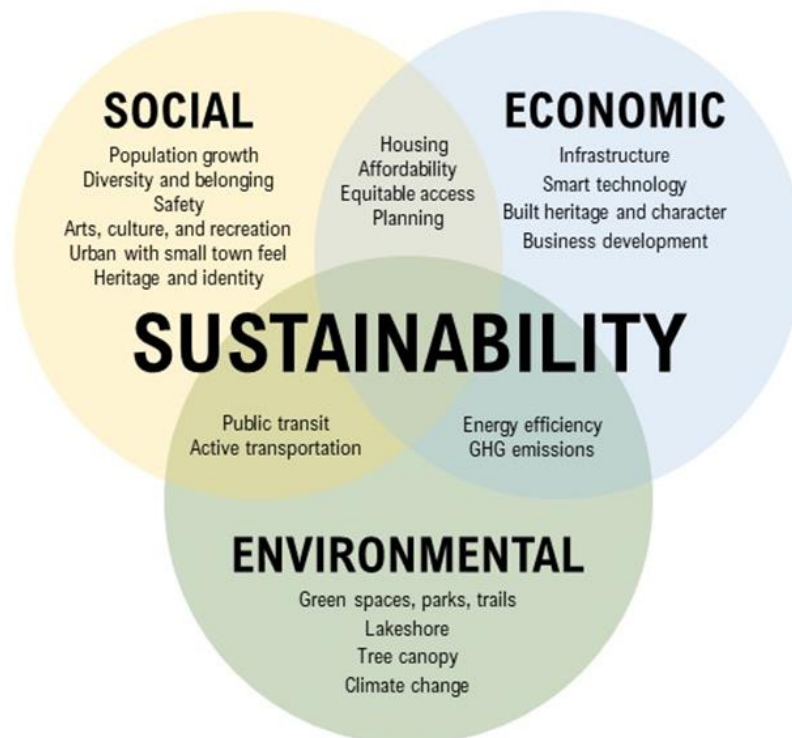
COMMENT/OPTIONS:

Staff is pleased to provide this update on the development of the new Council Strategic Plan and 2023–2026 Business Plan (the “Strategic Plan”).

As inputs into the development of the Strategic Plan, Deloitte prepared several documents summarizing the activities outlined above in the background section, including: Engagement Summary and Background Review; Community Profile; and Global Scan. These documents are included as appendices to this report, with highlights of key findings below.

Engagement Summary and Background Review

Overall, the most common themes that emerged across every engagement channel can be related to sustainability across three key dimensions: social sustainability, economic sustainability, and environmental sustainability.



Appendix A provides more detail and a summary of the engagement and review efforts mentioned in the background section, including key findings from the following:

- *Community satisfaction survey* (mixed-mode format via phone and online) – including overall key findings on p.6, detailed findings for each question starting on p.7, and a priority matrix that analyzed performance and importance to determine priority ranking for long-term goals on p.10.
- *Open houses* – including key themes on p.13 that emerged from conversations and feedback panels.
- *Intercept surveys* – including results on p.15 from survey questions posed to community members who were randomly approached.
- *Targeted outreach and engagement interviews* – including comments starting on p.17 to open-ended questions posed to individuals representing organizations whose mandates include: diversity, equity, and inclusion; education; arts and culture; sports and recreation; heritage; business innovation; galleries; libraries; archives and museums; charitable organizations and foundations; multi-cultural organizations; seniors; people with disabilities; and youth.

- *Mayor and Council engagement* – including common themes that emerged from one-on-one interviews with Members of Council on p.25, as well as key takeaways from the Greenhouse experience on p.27.
- *Social media engagement* – including data related to the social media efforts to promote engagement on Twitter, Instagram, and Facebook, starting on p.28.

Appendix A, at p.31, also includes the Background Review that was conducted following a review of town reports, documents, and policies listed on p.33. This review identifies common themes from the internal and external policy framework for the town.

Global Scan

Deloitte also conducted research into municipal global trends via their subject matter experts on relevant topics such as municipal service delivery, human centred design, and the use of technology to support growing, diverse cities. Commentary and case studies on relevant topics is provided for consideration in Appendix B.

Oakville Community Profile

Deloitte further prepared the Oakville Community Profile report in Appendix C, which offers a snapshot of the socio-economic profile of the town and informs on key patterns of change and trends identified in relation to demographics, quality of place, employment and business characteristics variables.

New Council Strategic Plan and 2023–2026 Business Plan

Staff is pleased to present to Council an initial draft framework of the new Council Strategic Plan and 2023–2026 Business Plan for consideration, discussion, evaluation of options, and endorsement in principle.

This draft strategic plan framework is provided in Appendix D, with the key pieces included as follows, with options for consideration indicated when relevant.

Vision:

- A thriving community for all; *or*
- A vibrant community for all

Mission:

- We serve the community with a focus on responsible and inclusive service delivery; *or*
- Serving the community in a responsible, inclusive way, dedicated to building economic, social, and environmental sustainability.

Guiding Principles

- *Leadership*: Striving to innovate and set a positive example
- *Inclusivity*: Creating a welcoming and inclusive community
- *Excellence*: Delivering high quality public services to residents and business
- *Sustainability*: Acting on environmental sustainability and natural spaces
- *Quality of life*: Providing vibrant culture, heritage and community amenities for all stages of life
- *Fiscal responsibility*: Making decisions driven by economic sustainability

Strategic Priorities and Objectives

Strategic priorities for the long term have been developed, based on the vision, mission, and guiding principles, which have been designed to connect the vision with action. These will guide specific deliverables and performance metrics, and will be enacted through municipal policy and departmental plans.

The collective aspirations of Town of Oakville's Council, leadership, residents, businesses, and stakeholders are reflected in these four strategic priorities with strategic objectives for each:

- *Growth Management*: Managing growth for a vibrant local economy, meeting infrastructure needs and ensuring efficient mobility across the town
 - *Economic Development* – Promote employment growth and the long-term vibrancy of the local economy
 - *Infrastructure* – Ensuring infrastructure meets the needs of the growing community
 - *Transportation* – Balancing safety, mobility, and environmental goals
- *Community Belonging*: Enhancing community belonging to ensure all residents are provided opportunities to engage in a fulfilling community life that supports wellbeing
 - *Engaging Residents* – Provide programming and opportunities for all residents to participate and engage in community life
 - *Complete Communities* – Design of community satisfies daily living needs for safe, connected communities, attainable for all
- *Environmental Sustainability*: Ensuring environmental sustainability to meet current and future needs related to greenspaces, natural areas and climate change considerations
 - *Greenspace, Parks, Trails* – Integrate greenspaces and parks throughout our community and conserving and enhancing our natural areas
 - *Climate Change Mitigation and Adaptation* – Reduce GHG emissions and manage environmental risks

- *Accountable Government*: Providing accountable government for excellence in service delivery and responsible management of resources
 - *Financial Management* – Ensure long-term fiscal sustainability of the town
 - *People Management* – Develop a diverse, talented, engaged, and appropriately resourced municipal workforce
 - *Service Excellence* – Review and continuously improve service delivery

Next Steps

Following the Special Council Meeting on May 17, 2023, the public and Members of Council can provide any initial feedback on the Strategic Plan to Sarah Lewis, Deloitte, sarlewis@deloitte.ca .

Staff will work to further refine and develop the new Council Strategic Plan and 2023–2026 Business Plan, with a view to the following upcoming key milestones:

- June 19, 2023 Council Meeting: At this public meeting, an updated draft strategic plan framework and business plan will be presented. The plan will combine the long-term vision, mission, guiding principles and the 2023-2026 Council term strategic priorities and objectives, with the identification of actions and initiatives. There will be a formal two-week review period for Council and public input and feedback following this meeting.
- July 11, 2023 Council Meeting: At this public meeting, the final updated plan will be presented to Council for approval. In addition to the above elements, it will include key performance measures and a reporting framework. Communications about the final plan will follow Council's approval.

CONSIDERATIONS:

(A) PUBLIC

Council's 2023–2026 Business Plan and update to Vision 2057, envisioned to be approved by Council in July 2023, will follow plans for broad engagement through several inputs including the 2022 Citizen Survey and community engagement, including options such as open houses, focus groups, interviews, as well as other surveys.

(B) FINANCIAL

Council's long-term vision and four-year business plan provides direction to assist in financial decision-making. The long-range financial forecast and the annual budgeting process will be fully aligned with Council's 2023–2026 goals.

(C) IMPACT ON OTHER DEPARTMENTS & USERS

Council's long-term vision and four-year business plan influences every department across the organization. Departmental work plans and budgets will reflect strategic directions established by Council and results will be reported through annual departmental business plans and the budgeting process. All reports to Council will align with Council's 2023–2026 goals.

(D) CORPORATE STRATEGIC GOALS

This report addresses the corporate strategic goal(s) to: Be accountable in everything we do, foster an engaged community and to continuously improve our programs and services. Council's long-term vision and four-year business workplan drives decision-making for the entire corporation.

(E) CLIMATE CHANGE/ACTION

As foundational strategic items affecting the entire corporation, Council's Strategic Plan and the associated 2023–2026 Business Plan will ultimately address a number of initiatives that will help the town and community adapt to and mitigate the effects of climate change. Climate action considerations, goals, and commitments have been embedded in all areas of strategic development, including decision-making, prioritization, visioning, and others.

APPENDICES:

Appendix A – Engagement Summary and Background Review

Appendix B – Global Scan

Appendix C – Oakville Community Profile

Appendix D – Strategic Business Plan Framework

Prepared by:

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Recommended by and Submitted by:

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