



Region of Waterloo

# Strategic Plan 2007-2010

January, 2007

## Update on Strategic Planning

### The Benefits of Strategic Planning:

1. Clearly defines the purpose of the organization.
2. Develops a common sense of priorities for Council and staff.
3. Establishes realistic goals and objectives consistent with the mission in a defined time frame.
4. Communicates the goals and objectives of the organization to the organization's stakeholders.
5. Develops a sense of ownership and engagement in the plan.
6. Provides a base from which progress can be measured.
7. Enables enlightened decision-making.
8. Provides a framework for managing change.

### Introduction

The Region of Waterloo engages in a corporate strategic planning process for every term of Council which establishes strategic focus areas and priority actions to address current issues and future trends. It also provides a focus for the organization and ensures that Council and staff share a common direction for the next four years.

The strategic planning cycle provides a process for priority setting and shares responsibility for the future across the corporation by determining:

- Where we are now.
- Where would we like the organization to be in the future.
- How will we get the organization to this desired future.
- Are we at that desired future yet.

The strategic plan for 2004—2006 identified five focus areas:

1. Manage regional growth to enhance quality of life.
2. Enhance community and social well-being
3. Protect and enhance the environment.
4. Ensure high quality regional transportation system.
5. Ensure operational effectiveness and efficiency.



“Over the past three years we have made remarkable progress on priorities in each of these areas. The 2007-2010 process will build upon the successes to develop and/or revise the key strategic focus areas and strategic priorities. Council and staff will play a major role in shaping this document.”

*Mike Murray*

## Strategic Planning Consultants

PMG Consulting has been hired to assist with the strategic planning process. Rob Grein will lead the public survey process in order to gather input into the development of future priorities. Dr. Wayne Taylor, PhD will facilitate the Strategic Planning sessions.

Rob is the founder of PMG Consulting and has more than a decade of public and private sector market research experience. Rob has expertise and experience in the public sector helping

advance the goals and strategies of many municipal governments including the City of Kitchener and The City of Waterloo. He also has experience working with the Region of Waterloo in municipal research including planning and development, growth management strategies, environmental impact initiatives, pesticide reduction, health services research, water delivery and long-term water strategies, and a variety of studies dealing with social marketing and behaviour change.

Dr. Wayne Taylor is an internationally recognized educator, consultant, facilitator and keynote speaker in the areas of policy development, strategic management, governance, quality management, and business-government relations. He has over thirty years' experience working with managers in the private, public, and not-for-profit sectors. Wayne has served as the Director of the M.B.A. Program in Health Services Management at the DeGroot School of Business, McMaster University since 1986.

## Strategic Planning Process

The strategic planning process is based on lessons learned and best practices of other municipalities as well as feedback from senior staff and Council. Through this research overall key principles were developed which highlight the need for increased involvement and communication with staff and the community throughout the planning process.

Based on these principles, 4 phases for the 2007 – 2010 strategic planning process have been developed as in figure 1. These phases will not be discreet rather they will overlap as the planning progresses.

Five key questions will be answered throughout the phases:

1. Where are we now?
2. Where do we want to be?
3. How will we get there?
4. Did we get it right?
5. Are we there yet?

All phases will have the following components at the core of implementation (see figure 1):

- Alignment - the strategic planning cycle will be directly tied to the budget process as well as other corporate initiatives.
- Communication - ongoing awareness and information sharing will be a key factor in the success of implementation.

- Knowledge - building stakeholder knowledge in the area of strategic planning will help to create an ongoing “strategic thinking” culture at the Region of Waterloo.
- Reporting - monitoring and reporting on strategic planning progress will be provided to all stakeholders.

The proposed phases will be reviewed and finalized by the new Regional Council early in 2007.

# Phases of Strategic Planning Process

## Phase 1

### Where are we now?

In this phase issues, trends, opportunities and challenges will be identified by departments which will provide a context for the planning work in subsequent phases. Involvement of regional staff and Councillors is critical to this phase. Also as part of the Region's commitment to citizen service, a public survey will be conducted early in 2007 to inform the development of future strategic priorities.

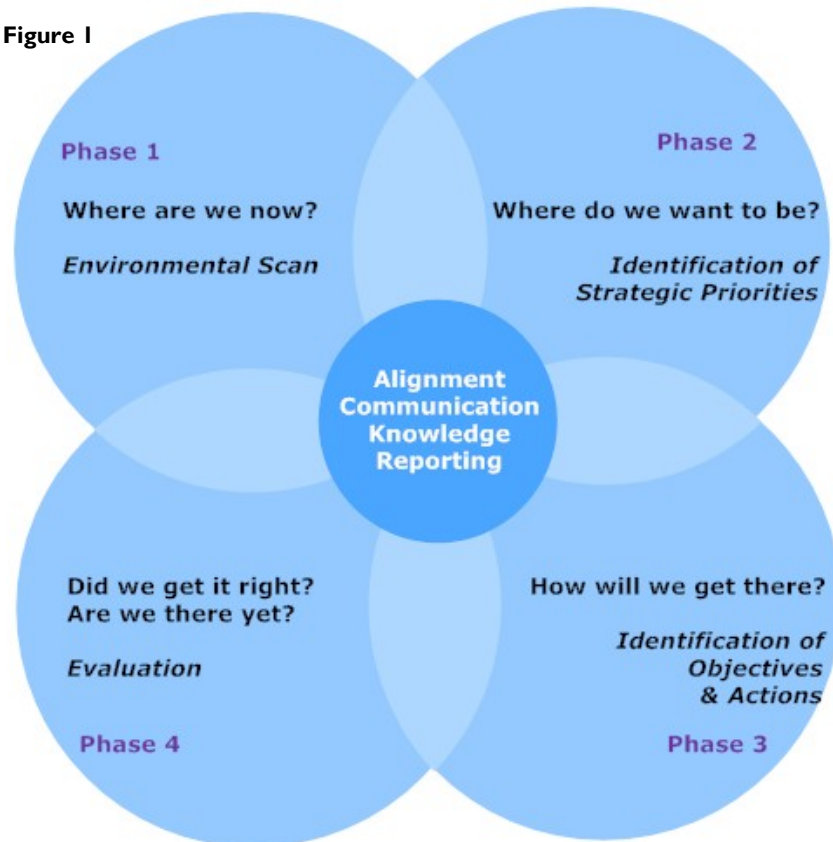
By the end of this phase we will have a clear picture of the desired future from the public and regional departments. The information generated will be summarized and provided to Council and the Corporate Leadership Team for the next phase of the planning.

## Phase 2

### Where do we want to be?

High level strategic focus areas and objectives to fulfill the vision and mission will be developed in this phase. This phase will include a planning session with the senior management team, and a subsequent planning session with Council and the Corporate Leadership Team to review and develop the strategic focus areas and objectives.

Figure 1



## Phase 3

### How will we get there?

Once the strategic focus areas and strategic objectives have been developed each department will apply these strategic priorities to their planning to create departmental and actions which will align with the corporate plan. Eventually department plans will be created after the approval of the corporate plan.

This phase will also include an opportunity for input by regional staff and community members.

## Phase 4

### Are we there yet?

Once the strategic focus areas have been identified, a framework and process for creating meaningful progress indicators and subsequent monitoring of these indicators, will be developed.

### Implementation

The goal is to have the strategic plan approved by Council in late June 2007. This will align with the 2007 budget cycle that will begin in September.

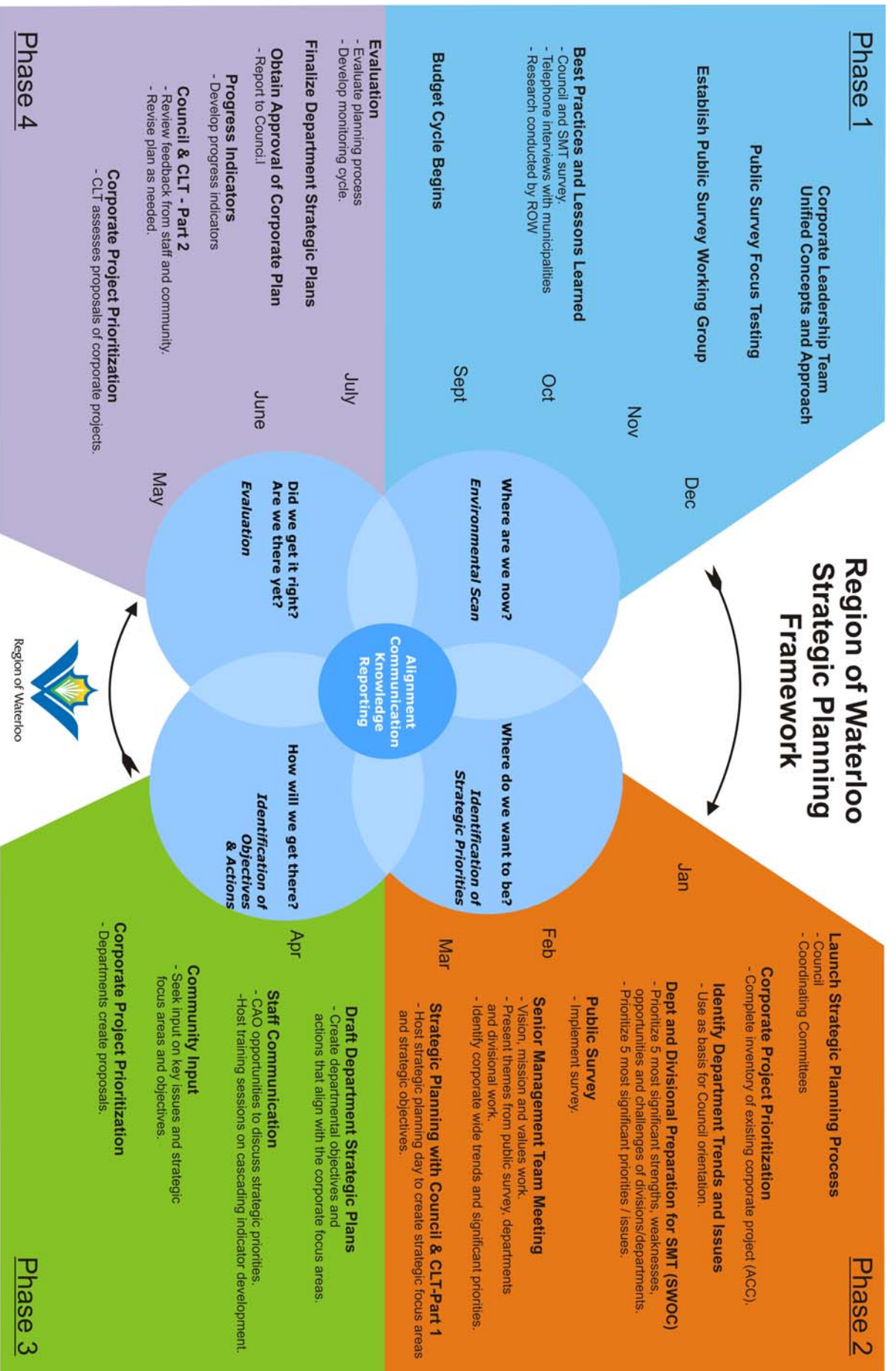
Department plans will be finalized after the corporate plan has been approved.

# Strategic Planning Schedule

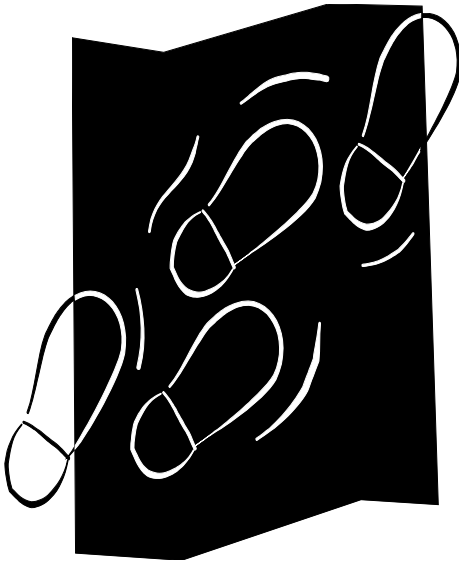
The planning cycle (found on page 5) and the following table identify the key activities and time-lines for the four phases. A communication plan will be implemented early in the planning process to ensure that information, expectations and timelines are shared with stakeholders.

Activity	Timeline
<b>Corporate Leadership Team Session</b> Session with CLT to create shared concepts and understanding.	December 20, 2006
<b>Preparation for Senior Management Team Meeting</b> Identify department priorities.	Due by February 5, 2007
<b>Public Survey</b> Develop and implement a process to gather public input that would assist in the development of a 4 year strategic plan for the 2007 – 2010 term of Council.	January 15 to February 8, 2007
<b>Senior Management Meeting</b> Facilitate a session with senior management to identify current trends and future priorities across the corporation and draft strategic focus areas and strategic objectives for consideration by Council.	February 22, 2007 Sunnyside Home 9:00 to mid afternoon
<b>Strategic Planning Day (Council and CLT) Part 1</b> Host a strategic planning session to identify and agree on the high level strategic focus areas and objectives.	March 2007 TBD
<b>Develop Departmental Objectives and Actions</b> Create departmental objectives and actions that align with, and will populate the corporate plan.	March to May 2007
<b>Staff Communication</b> Host sessions with staff to seek feedback on the key issues and strategic focus areas and objectives.	April 2007
<b>Community Input</b> Facilitate a process (such as focus groups with key community leaders and solicitation of feedback via the web), to seek feedback on the key issues and strategic focus areas and objectives.	April 2007
<b>Strategic Planning Day (Council and CLT) Part 2</b> <ul style="list-style-type: none"> <li>• Review feedback obtained from staff and community.</li> <li>• Revise draft strategic plan as appropriate.</li> </ul>	May 2007
<b>Develop Progress Indicators</b> <ul style="list-style-type: none"> <li>• Host departmental/divisional sessions for staff on progress indicator development.</li> <li>• Develop progress indicators for corporate and department actions.</li> </ul>	May 2007 June to Nov 2007
<b>Obtain Approval of Strategic Plan from Council</b>	June 2007
<b>Finalize department plans</b> Incorporate strategic focus objectives and actions in to department plans.	July to Oct 2007

# Region of Waterloo Strategic Planning Framework



## Next Steps



### Senior Management Team Planning Session

There will be a senior management team meeting (SMT) on February 22, 2007 (from 9:00 until at least mid-afternoon) at Sunnyside Home to help us identify key issues, and draft strategic focus areas and strategic objectives for consideration by Council. In order to prepare for this day we have asked departments to prepare information on the current and future trends, challenges, strengths and priorities. The information collected will be summarized in order to advance the work for the senior management meeting.

### Public Input

As part of the Region's commitment to citizen service, public input will be collected throughout the strategic planning process to inform the development of future strategic priorities. A public survey is the first process to obtain public input for the 2007-2010 strategic plan. The goal is to complete this public survey prior to the development of strategic priorities by Council and CLT in March 2007. This public survey will be statistically rigorous and reliable and will be informed by a working group which represents all departments of the Region. The Public Survey Working Group members are as follows:

#### Members

- Public Health—Theresa Schumilas
- Corporate Resources— Kris Fletcher, Walter Gasparini
- Social Services— Lynn Randall
- Finance—Lee Parent
- Human Resources—Bev Aikenhead
- Transportation & Environmental Services— Jon Arsenault
- Planning Housing & Community Services—Keren Adderley, Kevin Eby, Graham Vincent
- CAO's office—Bryan Stortz
- Community Safety and Crime Prevention Council – Chris Sadeler
- Performance Measurement—Stefan Loker
- AODA—Deb Bergey
- Manager of Strategic Planning – Lorie Fioze
- Student – Brian Hoessler
- Consultant—Rob Grein

### STRATEGIC PLANNING UPDATES

The purpose of this bulletin is to provide an update on the 2007-2010 strategic planning process. These updates will be provided quarterly or more often as necessary.

Should you have any questions or suggestions for future updates please contact:

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