





Today's Agenda

Ite	Time	
1	Team Introductions	5 min
2	Introduction to Strategic Planning	10 min
3	The Strategic Planning Process	10 min



Introductions | Our Team



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Emily WhiteDirector
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Elliott Houle Consultant StrategyCorp

• • • Introduction to Strategic Planning | Why We Do it



What is Strategic Planning?

Strategic planning is about managing change and making decisions today that will shape tomorrow.

- Strategic planning involves thinking about the future: Where are we going? How will we get there?
- Strategic Plans are one of the **best communications** tools to pitch your message.
- If you get it right, a good Strategic Plan will help you communicate to staff what you want and help you tell the community where you are going and why.

Why is Strategic Planning Important?

- ✓ Establishes and clarifies vision, values, goals, and priorities.
- ✓ Guides future direction.
- ✓ Supports organizational alignment and shared ownership.
- ✓ Allows you to align resources (fiscal and human) to priority areas.
- ✓ Allows you to 'build' your team (inside and out) and your expertise.
- ✓ Supports the building of strong relationships and creates accountability.
- ✓ Allows you to measure success and report on results.



Strategic Plans are Critical to Effective Municipal Governance

Practically speaking, the Strategic Plan is the overarching document that...

- Guides **Council decision-making** over the lifespan of the Plan;
- Informs County plans, strategies, and initiatives and the annual budget;
- Connects staff's day-to-day work to the County's overall strategic direction; and
- Builds unity and collaboration within Council and between Council and staff as all work towards a collective vision.

"If a municipality doesn't know where it is going, how can it make sure that both Council and staff are all going in the same direction?"

MMAH Ontario Municipal Councillor's Guide (2018)

STRATEGIC PLAN

Defines an organization's vision and goals but not how to achieve them

OPERATING PLANS

Articulate how to achieve the organization's goals



BUDGET

Defines the limits but not the objectives



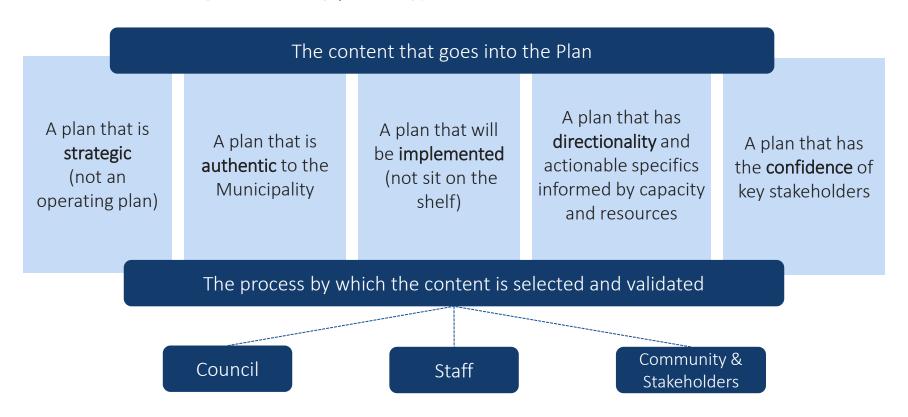
Scope of a Strategic Plan | A Municipality's Realm of Influence

- A municipality does not just shape the community when it spends or sets rules.
- A critical function is how it convenes other community leaders (e.g., business, neighbourhood, health, and education leaders) to consider the overall health of the community, identify issues and needs, and address them collectively.
- Another critical function is how the municipality advocates with lower tier and surrounding municipalities and regions, the Province and/or Federal government.

"What we can control"			"Things we cannot control"		
Invest	Deliver	Regulate	Lead / Convene	Advocate	



Municipal Strategic Planning | StrategyCorp Core Principles

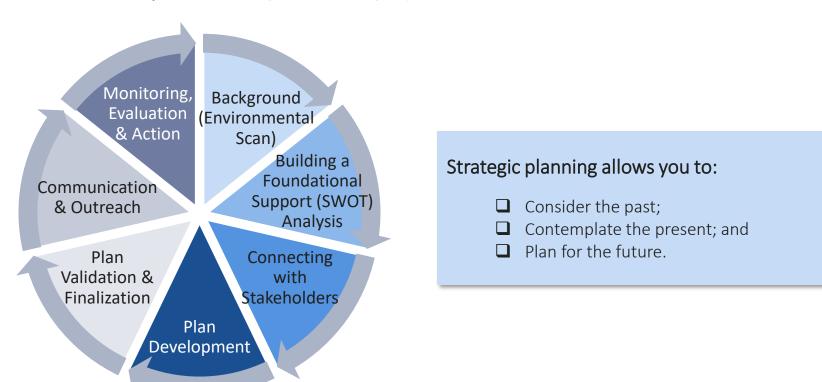




• • • The Strategic Planning Process | How We Do it



Best Practices | The Strategic Planning Cycle





Our Strategic Planning Project Approach



	Phase 0: Project Kick-Off	Phase 1: Research & Consultation	Phase 2: Community & Staff Feedback	Phase 3: Strategy Development	Phase 4: Implementation Plan & Finalization
Activities	 Conduct Project Kick-Off. Share Data and Documentation Request. Share Kick-Off Summary Memorandum. 	 Review Data and Documentation. Present to Council Regarding Strategic Planning. Prepare for Interviews and Facilitate Interviews with Council and Senior Leadership. Conduct High-Level Environmental Scan. Develop Visioning & Goal Setting Workshop Material and Conduct Workshop. Create Draft Strategic Framework. Present and Refine Draft Strategic Framework. 	 Prepare for Community and Staff Engagement. Conduct Community Consultation. Engage Staff. Develop a Consultation Summary Report. Update and Present Revised Strategic Framework. 	 Draft Validation & Refinement Workshop Material; Conduct Workshop. Update Strategic Framework. Develop Public-Facing Strategic Plan. Present and Refine Strategic Plan. 	 Conduct Implementation Planning (e.g., develop scorecards, create risk management plans, support staff communications planning). Present Strategic Plan to Council.
Outputs	 ✓ Project Kick-Off Material. ✓ Project Kick-Off Summary Memorandum. ✓ Data and Documentation Request. 	 ✓ Strategic Planning Council Presentation. ✓ Council and Senior Leadership Interview Guides. ✓ Visioning & Goal Setting Workshop Material (to include High-Level Environmental Scan). ✓ Draft Strategic Framework. 	 ✓ Stakeholder Engagement Materials. ✓ Consultation Summary Report. 	 ✓ Validation & Refinement Workshop Material. ✓ Public-Facing Strategic Plan. 	✓ Implementation Plan.✓ Council Presentation Material.
	2 Weeks	12 Weeks	8 Weeks	7 Weeks	3 Weeks

How We'll Engage Council & Stakeholders



With Council

- 1:1 Interviews
- Full-Day Visioning & Goal Setting Workshop
- Validation & Refinement Workshop
- Final Plan Approval



With Staff

- 1:1 Interviews (Senior Leadership)
- Full-Day Visioning & Goal Setting Workshop (Senior Leadership)
- Validation & Refinement Workshop (Senior Leadership)
- Digital Survey (All Staff)
- Focus Groups (Select Staff Representatives)
- · Final Plan Review



With Residents

- Digital Survey
- In-Person Community Pop-ups

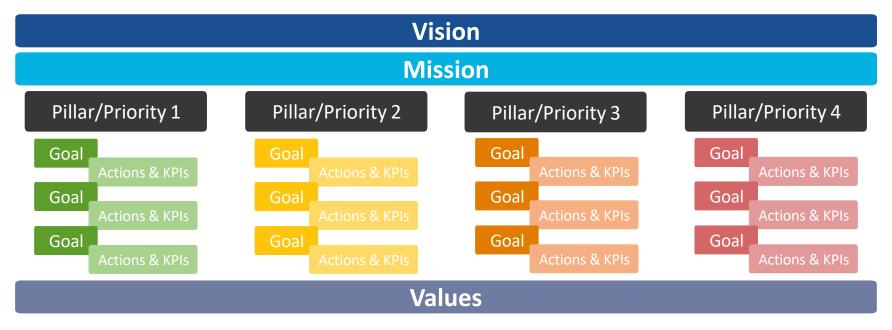


With Community Stakeholders

- 1:1 Interviews
- Written Submission Invitations

Strategic Plan Structure

Using input from the environmental scanning and Council, staff, stakeholder, and community engagement, a strategy architecture will be developed.





Next Steps

- We will be reaching out to you to schedule a 30-minute interview.
- We will share an interview guide in advance to provide you with an idea of what we'd like to discuss.
- If you have any questions, please reach out to Chris (<u>cloreto@strategycorp.com</u>) or Emily (<u>ewhite@strategycorp.com</u>).





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