



## Town of Niagara-on-the-Lake

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**REPORT #:** CAO-23-065

**COMMITTEE DATE:** 2023-07-25

**DUE IN COUNCIL:** 2023-07-25

**REPORT TO:** Council

**SUBJECT:** 2022 – 2026 Council Strategic Plan

### 1. RECOMMENDATION

It is respectfully recommended that:

- 1.1 Council endorse the 2022 – 2026 Council Strategic Plan (**Appendix I**);
- 1.2 Council extend the term of this Strategic Plan to 2027 and revise the document's title to "2022 – 2027 Council Strategic Plan";
- 1.3 Council direct Staff to create an implementation plan and key performance indicators, and present this information to Council in the fourth quarter of 2023; and
- 1.4 Council direct Staff to present progress reports on a bi-annual basis in the second quarter and fourth quarter of each year.

### 2. EXECUTIVE SUMMARY

- Strategic planning is an organization's process of defining its vision, direction and long-term goals, creating specific plans to achieve them, implementing those plans, and evaluating the results.
- Council's Strategic Plan is a roadmap for success to ensure decisions made today set the course for the desired future of our community.
- The Strategic Plan document in **Appendix I** is the result of collaborative discussion, open dialogue, and consensus building among Council, Staff, the community, and stakeholder engagement.
- The Strategic Plan includes a revised vision and mission statement.
- The Strategic Plan has two (2) lenses: a diversity, equity and inclusion lens, and an environmental stewardship lens.
- The Strategic Plan includes three (3) community pillars and a foundation pillar, which supports the community pillars.
- It is recommended the term of this Plan be extended to 2027 to provide adequate time for the next term of Council to develop their Strategic Plan process and permit Staff to continue working on multi-year initiatives throughout elections and Council onboarding.
- Staff will report back with an implementation plan and measures of success in the fourth quarter of 2023.
- Staff will provide progress reports on a bi-annual basis in the second quarter and fourth quarter of each year.

### 3. PURPOSE

The purpose of this report is to present the 2022 – 2026 Council Strategic Plan. This document includes Council's vision, mission and priority projects and initiatives.

### 4. BACKGROUND

Strategic planning is an organization's process of defining its vision, direction and long-term goals, creating specific plans to achieve them, implementing those plans, and evaluating the results. At the beginning of each Council term, the Office of the Chief Administrative Officer coordinates the development of a Strategic Plan to establish key goals and initiatives that will move the community forward. Council's Strategic Plan provides direction to Town Staff about areas of focus as the organization works toward achieving its vision.

On March 21, 2023, Council approved Report CAO-23-041 – 2022-2026 Strategic Plan which outlined the overall process and engagement plan. One-on-one meetings with all members of Council and the Strategy and Government Relations Officer took place to identify individual priorities and goals.

On April 19, 2023, Council and Senior Management had a joint Strategic Plan session. At the workshop a list of priorities and goals were established and suggested Pillar titles were agreed upon to present to the public for feedback. The summary of this workshop, along with a public survey, was presented and received by Council at the May 16, 2023, COTW-General meeting.

Throughout the last two weeks of May, Staff hosted six in-person Public Information Centres across the villages and one virtual session to engage with the public about Council's Strategic Plan. Approximately 100 people attended the in-person and virtual sessions. In addition, an online survey was available on the Town's online engagement tool, Join the Conversation. In total, 177 surveys were completed and 453 people visited the website. 59% of survey respondents live in Old Town and 48% of respondents identified within the 50 – 69 age group.

To ensure there was internal buy-in from Staff, who are responsible for executing the actions within Council's Strategic Plan, a survey was issued in June. Of note, 89% of respondents indicated that they felt the Strategic Plan adequately represented their Department and Division. The full results of the community and staff feedback were presented to Council on June 13, 2023.

A Council workshop took place on June 29, 2023, to discuss the preferred vision and mission statements, the pillar titles, and prioritizing and reorganizing goals and actions. Multiple strategic planning prioritization activities took place, including dot voting and ranking. The discussion and feedback from this workshop are reflected within the final document (**Appendix I**).

One-on-one stakeholder interviews took place the week of July 10:

- Andrea Kaiser – Regional Councillor
- Chandra Sharma and Senior Management Team – Niagara Peninsula Conservation Authority
- David Adames – Niagara Parks Commission

- Lisa Curtis – Parks Canada Agency
- Minerva Ward and Andrew Niven – NOTL Tourism
- Pam Skinner and Vince Malvaso – Niagara College

The stakeholder interviews were very informative and identified excellent opportunities for future collaboration. As a result of the meetings, Tim Jennings, Executive Director/CEO of the Shaw Festival Theatre was added to the consultation list.

A significant amount of stakeholder engagement has been completed and informed the final document being presented to Council.

## 5. DISCUSSION / ANALYSIS

The 2022 – 2026 Council Strategic Plan includes the following components:

- **Vision** – represents what we aspire to be
- **Mission** – identifies why we exist as an organization
- **Lenses** – provides two specific areas that must be considered when making decisions
- **Pillars** – provides guidance on where we are focusing our efforts to meet desired outcomes
- **Foundation** – Staff provides the foundation of executing Council's Strategic Plan and have internal objectives and goals that complement the delivery of services
- **Objective Statement** – provides an overarching goal to achieve within each Pillar
- **Priorities** – provides specific focus areas to support the objective
- **Action Items** – indicates specific actions to be taken to achieve priorities
- **Indicators of Success** – high-level accomplishments that indicate successful outcomes

Council's Strategic Plan includes three areas of focus for 2022 – 2026:

- Vibrant and Complete Community
- Good Governance
- Enrich Community Assets, Environment, and Infrastructure

There is also the Foundation Pillar: Optimize Organizational Excellence.

Each strategic direction stems from critical issues identified through an extensive review of current and emerging influences from political, environmental, social, technological, economic, and legislative perspectives.

To better identify and communicate success, it is proposed that the next step is for Town Staff to develop an implementation plan with key indicators to demonstrate accountability and impact. It is proposed this be presented to Council as information in the fourth quarter of 2023. Also, to ensure accountability and demonstrate progress, it is suggested that Staff report to Council on a bi-annual basis (Q2 and Q4 of each year).

It is also proposed Council extend the length of the Strategic Plan and rename it to read "2022 - 2027 Council Strategic Plan". This will provide adequate time for the next term of Council to develop their Strategic Plan process and permit Staff to continue working on multi-year initiatives throughout elections and 2026 – 2030 Council onboarding. It is anticipated the majority, if not all, indicators of success will be completed and reported through the Q2, 2026 Progress Report.

## 6. STRATEGIC PLAN

The content of this report supports the following Strategic Plan initiatives:

### Pillar(s)

4. Excel in a Positive Workplace

### Objective(s)

4.1 Strengthen staff and Council partnership

### Tactic(s)

4.1 a) Develop organizational values that will drive behaviours that will have positive impacts on interpersonal

### Pillar(s)

5. Strengthen 2-way Communications

### Objective(s)

5.3 Strengthen communications delivery methods

### Tactic(s)

5.3 b) Understand and meet the informational needs of all constituents

## 7. OPTIONS

- 7.1 **Option 1:** Endorse the 2022 – 2026 Council Strategic Plan and amend the title to read “2022 – 2027 Council Strategic Plan”; **(Recommended)**
- 7.2 **Option 2:** Endorse the 2022 – 2026 Strategic Plan and keep the title to read “2022 – 2026 Council Strategic Plan”; *(Not Recommended)*
- 7.3 **Option 3:** Amend the 2022 – 2026 Council Strategic Plan *(Not Recommended)*
- 7.4 **Option 4:** Defer the 2022 – 2026 Council Strategic Plan *(Not Recommended)*

## 8. FINANCIAL IMPLICATIONS

Financial implications will be determined and communicated as the implementation plan and key performance indicators are developed. Additional financial implications will be presented during the 2024 budget process and future opportunities will be flagged for upcoming years. It is anticipated Council's Strategic Plan will inform future budget processes.

## 9. ENVIRONMENTAL IMPLICATIONS

Environmental stewardship plays a key role in Council's Strategic Plan. It is a lens through which all aspects of decision-making will be made through to ensure responsible resource management. In addition, the environment is referenced and embedded within all three Pillars, most specifically, “Enrich Community Assets, Environment, and Infrastructure”. Ideally, environmental stewardship, which includes conservation and preservation, will be evident in decision making and policy development of the 2022 – 2026 term of Council. In addition, the Niagara Peninsula Conservation Authority (NPCA) is enthusiastic to work in collaboration with the Town to achieve our environmental stewardship goals.

## 10. COMMUNICATIONS

A robust communications plan will be developed to ensure Council's Strategic Plan is clearly communicated to the public and staff. Infographics will be developed for social media as part of an education campaign for the Strategic Plan. The Strategic Plan Summary page (page 11) will be placed under each blotter in the Council Chambers and circulated to all staff. In addition to updating the Town's website, external-facing dashboards are being explored to communicate progress and success to the community.

## 11. CONCLUSION

Council's Strategic Plan is one of the most powerful tools within a local municipality. The Plan will remain dynamic and relevant through the term of Council. It provides a collective starting point and will be used as a guiding tool for Council, Staff, and the community. It is essential that Council and Staff move in lockstep and have the same roadmap to achieve the same destination. Successful implementation of Council's Strategic Plan is preliminarily noted through high-level Indicators of Success as identified in the document. Achieving success will rely upon well-defined goals, clear action steps, and effective monitoring. It is recommended that Council approve the final document for the 2022 - 2026 Strategic Plan.

## 12. PREVIOUS REPORTS

- CAO-23-041: Council Strategic Plan Update
- CAO-23-053: 2022 – 2026 Council Strategic Plan Update
- Stakeholder Engagement Presentation (June 13, 2023)

## 13. APPENDICES

- **Appendix I** – 2022 – 2026 Council Strategic Plan

Respectfully submitted:

**Recommended by:**



**Victoria Steele, B.A., Dipl.M.A.  
Strategy & Government Relations Officer**

**Submitted by:**



**Marnie Cluckie, MS.LOD, B.ARCH, B.ES  
Chief Administrative Officer**