

## THE TOWN OF OAKVILLE NEEDED A PLAN

One of the key roles of Council is to set the strategic direction for the corporation, which is then used to develop a plan to guide the corporation's business planning and budget decisions. Town staff must ensure that operational plans are aligned with Council's goals and must implement a process to track and measure progress. Prior to creating the Town's mission-driven strategic plan in 2007, the corporation followed an informal and inconsistent process where decisions were made based on master plans, budget documents, and external and internal pressures. With a newly elected Mayor in 2006 and four first-time councillors, it was the appropriate time to develop a plan that would guide decision-making and provide a unified direction for the 2006–2010 term of council, and beyond.

## OAKVILLE IS MISSION DRIVEN — IMPLEMENTATION AND COSTS

### Developing Oakville's Strategic Direction

Town Council and the senior leadership team began a six-month preparation period of the strategic plan in December 2006 that included reviewing election results, voter feedback, trends in municipal governments, master plans and deferred ideas from prior years. Council worked with staff to develop the plan together, including conducting strategic SWOT assessments regarding Town services and meeting with Town staff on two weekends. Working together on the plan fostered relationship building that would guide positive relations between the newly elected Council and Town staff.

In March 2007, a public input session was held to outline the vision, mission, values and priorities that had been adopted by Council a few weeks earlier at a strategic planning session. The public was invited to share their ideas on how to achieve goals and measure progress.

A six-week online survey was also conducted to gauge the public's view on the Town's strategic direction. To augment the survey, two more public information sessions were held to

engage individuals and over 25 Town citizen advisory committee representatives to discuss how the proposed strategic plan could be implemented. The public was also invited to review and provide feedback on the draft strategic plan through the Town's website. This feedback phase occurred from March to May 2007, during which a variety of committees, groups and individuals submitted valuable comments, including many advisory committee representatives who demonstrated how their 2007 work plans would align with Council's strategic directions. The Strategic Plan was approved by Council in June 2007.

### **Implementing Recommendations**

For the strategic plan to be truly effective, the vision, mission, values and goals must be integrated into the activities and planning of Council and staff. The plan must also be reviewed annually by Council to determine if the Town is meeting its goals.

Annual key processes were put in place to ensure that the plan continues to reflect Council's strategic priorities: Each year, from January to March, Town staff surveys and researches activity through the bi-annual citizens' survey and identifies emerging issues. In April/May, a Council Strategic Plan Review meeting is held to review progress, identify potential adjustments and determine areas of focus for the next calendar year. From June to October, the Town is involved in departmental business planning and budgeting including the review of public feedback; identifying actions and measures to achieve Council's strategic direction; and aligning departmental work plans with Council strategic directions, areas of focus and other strategic goals. From October to November, annual employee performance reviews take place, and goals and objectives are set for the following calendar year. In December to January, there is a budget/business plan approval and strategic plan update where Council approves business plans and budget allocations based on strategic priorities; Council also identifies budget approval items that do not align with strategic priorities and adjustments are made to the plan as required.

To communicate the Town's first strategic plan to staff, in April and October 2008, the CAO and senior leadership team met with all directors, managers, supervisors and senior advisors to outline the plan and highlight their role in supporting its implementation. The plan was also made available to staff on the Town's intranet. To communicate the plan to the public, newspaper ads were placed in Oakville's two local newspapers and the Town's website.

The total cost of \$28,000 to create the plan includes print materials and the assistance of Dr. Chris Bart (to bring expertise to the strategic planning process and facilitate discussion between the senior leadership team and Council).

## THE RESULTS

The Town's 2007–2010 Strategic Plan is *mission-driven*. While similar to a *goals-based* strategic plan, the mission-driven approach means that the Town's goals are based directly on the Corporation's vision, mission and values. While the mission-driven approach is used in leading business corporations and is endorsed by the Director's College of Canada, Oakville is the first municipal government in Canada to specifically adopt this method. The result is a strategic plan that establishes the Town's vision, mission and values as the framework for all decision-making. The Town's plan clearly outlines the goals, actions and measures required to move the organization and the community toward Council's desired future. It sets out long-term goals and short-term areas of focus, establishes measures to guide progress and track accomplishments, and is linked to departmental initiatives through the annual business planning and budgeting process.

**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 caring that they are expected to deliver to the community.

**Values:** Accountability: deliver what we promise; Dedication: willingly take on responsibility and serve the community; Honesty: demonstrate personal integrity, truthfulness and honesty; Innovation: be creative, show initiative and take risks; Respect: value an inclusive workplace and respect cultural and social diversity; Teamwork: collaborate across departments and work in partnership with the community.

Departments are responsible for identifying key activities to support the strategic plan in their annual business plans and budgets. Staff performance is also linked to strategic goals through the Town of Oakville Performance System (TOPS). Council and the public track the Town's progress through annual reporting to Council and the budgeting process. Since 2007, the formalized plan has helped Council, staff and the community understand the Town's strategic vision, and as a result, all actions identified for 2007–2008 are complete, ongoing or underway.

The 2007 Citizens Survey, conducted in late October, revealed that Oakville residents have a very positive perception of the livability of their Town. A large majority — 83 per cent — indicated the degree of livability in Oakville is generally better than most areas of the Greater Toronto Area.

In December 2008, the Town's first employee engagement survey was conducted and when asked about the Town's mission, vision and values, 73 per cent of staff indicated they understand the

vision and values and 70 per cent indicated they understand how their department's or division's goals and objectives relate to the corporate purpose and beliefs. In total, 81 per cent of full-time staff took part in the survey and after adding in part-time, temporary/casual and contract staff, the overall response rate was 68 per cent (1,333 staff out of 1,955).

## **OAKVILLE IS MOVING FORWARD — LESSONS LEARNED**

The Strategic Plan is intended as a work in progress, rather than a static document. While the vision, mission, values and goals will remain constant over the term of Council, Council has and will continue to review and refine its areas of focus, strategies and actions annually.

During the planning stage, in an effort to make an efficient use of both the time Council and staff had to meet as well as to manage the costs associated with developing the plan, Councillors were asked to conduct SWOT assessments of Town services to solicit feedback prior to meeting with Town staff. As a result of this advance planning and the involvement of both Council and staff, meetings ran smoothly and were rich with relevant content, relationships between staff and Council were enhanced, and Council's ownership of the plan was established.

Ongoing implementation and analysis of the plan reveals there is always room for improvement. In 2008, Town staff created a simple, one-page front and back chart which highlights the actions achieved in 2007, 2008 and those actions forecasted for 2009. The chart provides an easy reference for Council, staff and the public, and was presented to Council as part of annual reporting.

The strategic plan provides a framework to assist council and staff in making fundamental decisions and choices. Over the past two years, it has helped council and staff to identify what is most important to achieving organizational success. This is the key value that strategic planning brings to any organization.