

Members of the public may attend the meeting in person, or may observe the meeting proceedings by viewing the [livestream](#). A recording of the meeting will also be available on the [City's website](#) following the meeting.

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2023

Strategic Work Planning & The City of Pickering – Special Meeting of Council

**STRATEGIC PLANNING
PRIMER**

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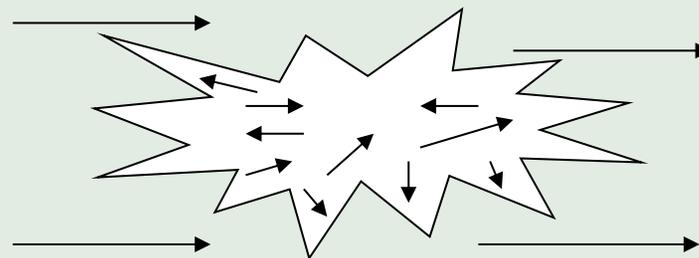
2/15/2023

City of Pickering Council Strategic Work Planning Workshop

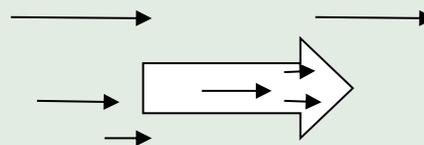
Strategic planning is about change. It is a tool used by organizations like the City of Pickering to define the direction the organization will take and the techniques that will be used to get there.

A Strategic Plan is a blueprint or a roadmap that leads an organization from where it is now, to where it would like to be in the future.

Organizations without a Strategic Plan can lack alignment:



An organization with a Strategic Plan that is supported by its members can use it as a Roadmap for the future:



What Is Strategic Planning? What Is A Strategic Plan?

➤ Simple versus Complex?

Strategic Plans are as individual as the organizations that develop them. Some are very simple and straightforward documents; others are more complex and detailed. The choice is yours.

➤ Is There a Standard Format?

Strategic Plans vary in format, focus and orientation. Usually they contain a Vision Statement, a Goal (or set of Goals) and a series of Objectives or Strategies.

➤ How Long Do They Take To Develop?

Strategic Plans can be developed very quickly, or they can develop over a longer time frame. Some organizations want to put their strategic thinking on paper quickly and do so without the benefit of speaking with others. In most cases, Strategic Plans can be developed in a six month period, allowing for the involvement of clients and partners.

Why Is Strategic Planning Important? What Are The Benefits of a Strategic Plan?

Strategic Planning is an excellent tool that allows organizations (and the individuals that are part of an organization) to think collectively about the future.

Strategic Planning provides the framework that enables organizations to consider the changes they will be facing together. It allows for collective ownership of key priorities and it provides a vehicle to allow decisions to be made today that will shape the highly probable future.

A well-conceived Strategic Plan is an important document. It can:

- clarify future direction
- establish priorities
- promote proactive and forward thinking
- develop effective strategies and policies that reflect aspirations
- consider the future consequences of decisions
- deal with rapidly changing circumstances
- improve organizational performance
- align resources (fiscal and human) to areas of corporate priority
- build teamwork and expertise
- strengthen external partnerships and increase coordination
- build relationships

The advantages of a relevant, reflective and broadly supported Strategic Plan are many.

Be Proactive & Adaptive

Strategic Plans enable organizations to move from being reactive to being proactive. Strategic planning enables organizations to constantly learn from the environment and to adapt accordingly. It promotes the building of resiliency.

Set Clear Direction

Strategic Plans allow organizations to set clear, consistent and up-to-date direction. Strategic Plans also allow organizations to articulate and confirm corporate values. They enable organizations to become mission-driven – aligning the vision and mission with goals and objectives and performance measures.

Gain Credibility

Strategic Plans allow organizations to develop policies that reflect aspirations and to establish (and refine) program priorities. They enable organizations to become customer-focused and by articulating priorities, they enable organizations to gain credibility and trust as an organization.

How Are Strategic Plans Developed?



There are many different ‘models’ that are used in developing Strategic Plans. Most organizations end up selecting a model and modifying it as they develop their own planning process. There are, however, a range of models that may allow you to better understand the range of possibilities. Two of these models are discussed below.

- *The Basic Model*
- *The Issue Based Model*

The “Basic” Model

The very ‘basic’ strategic planning process involves five key steps:

1. Identify your purpose (Vision Statement). A Vision statement defines a Big Audacious Goal (BAG). It describes a set of ideals/priorities and paints a picture of the future. It sets out what makes the City of Pickering special and unique.
2. Sometimes strategic plans also include a Mission Statement – a Mission Statement defines the role the organization will play in achieving the vision. Many organizations find a Vision & a Mission Statement duplicative and confusing and prefer a more refined Strategic Plan that contains only a Vision Statement. What do you think?
3. Select goals that support the achievement of the Vision. Goals are general statements about what you need to accomplish to meet your purpose or vision and to address the major issues that are affecting the organization.
4. Identify specific approaches/strategies that must be implemented to reach each goal.
5. Identify specific actions to implement each strategy.
6. Monitor and update the plan.

The “Issue Based” Model

The Issue Based Model is a Goal-Based Strategic Plan that involves ten steps:

1. 360 Degree Review – SCOT Analysis (Strengths – Challenges – Opportunities – Threats)
2. Strategic Analysis to identify corporate values and prioritize major issues/goals.
3. Develop strategies to address issues/goals.
4. Design/update the vision, mission and values.
5. Establish Action Plans (objectives, resource needs, roles and responsibilities for implementation)
6. Record the Issues, Goals, Strategies, Updated Mission & Vision & Action Plans
7. Develop an Operating Plan
8. Authorize the Budget on an Annual Basis
9. Conduct the organization’s year-one operations
10. Monitor/review/evaluate/update the Strategic Plan.

Some Questions For You To Consider



To prepare for our initial Strategic Planning dialogue, there are some questions that you may wish to consider.

- *Where are we now?*
- *Where do we want to be in the future?*
- *How will we get there?*
- *How will we measure our progress?*

Municipal Business
Vision
Purpose & Values
Corporate Assessment
Strengths
Clients/Partners
Challenges
Opportunities
Effectiveness
Continuous Improvement

- What business are we in?
- What is our vision of the future?
- What is our underlying purpose? Why do we do what we do? Where are we going? What are our values – individually and corporately?
- How well are we performing?
- What do we do best? What do we do well?
- Who are our clients and partners? Who do we serve? Who should our target clientele be?
- What are the challenges we are currently facing?
- What opportunities exist that we should avoid? What opportunities exist that we should exploit?
- Are we productive and effective in what we do? How do we know?
- How can we remain on the leading edge of innovation?
- How will we operationalize our Strategic Plan? What projects/specific initiatives will we focus on?

Common Strategic Planning Terms:

An explanation of strategic planning terminology follows...

Vision

The vision statement is your inspiration. It describes a set of ideals and priorities; it describes a picture of the future; a sense of what makes the City of Pickering special and unique.

The vision defines the B-A-G – the organization’s Big Audacious Goal. Because it is audacious, it represents a significant challenge and its achievement will require the City of Pickering to move beyond its comfort zone. It is clear and compelling to everyone. It has a clear finish line that will take time and hard work to accomplish. The goal should stimulate leadership activity, commitment and participation beyond the City’s current leadership.

A vision statement must be: realistic, credible, attractive (it must galvanize people to act) and it must describe a future state (not a present condition).

VISION STATEMENT – Examples

Region of Durham: “A healthy, prosperous community for all.”

City of Brock: “A welcoming, vibrant community growing in harmony with our surroundings. Breathe it in.”

Township of Gravenhurst Community Strategic Plan Vision Statement: “Gravenhurst will be the Muskoka destination. The most innovative community in Ontario – clean, green, intelligent and sustainable.”

Thunder Bay: “One City, Growing Together.” Thunder Bay will foster an inclusive city focused on service excellence and partnerships to provide a high quality of life to our citizens. We embrace and celebrate our diversity as it makes our community a vibrant and dynamic place to grow.”

Mission

Your Mission is your reason for being. It is why you exist and it describes your purpose.

Values

A small set of timeless, guiding principles that do not require external justification. They have intrinsic value to the organization. Core values are fundamental that they seldom, if ever change. They define the behaviour required in order for the organization to achieve its purpose.

Core values can include the following: Openness, Transparency, Respectfulness; Integrity, Honour, Professionalism, Innovation, Accountability, Collaboration, Continuous Learning, Ethical Behaviour, Innovation.

Goals

A goal is an outcome-oriented statement that will lead the City of Pickering toward its envisioned future. The goals are not in any order of priority. All of the goals will need to be achieved if the City is to fully realize its strategic vision. Goals are general objectives that explain what you are attempting to achieve.

Examples:

- Healthy, Safe & Sustainable Communities
- A Strong & Prosperous Economy
- A Protected Natural Environment
- Optimized Cultural & Recreational Assets
- Organizational Excellence

Strategies/Strategic Actions

Strategies define the specific actions that will be taken to attain goals.

Unlike goals, strategies are **SMART** – Specific, Measurable, Achievable, Realistic & Time-Bound.

Examples:

- Develop an Emergency Response Plan.
- Improve/Enhance Internet/Broadband
- Develop a Parking Strategy
- Improve Visibility through a Signage and Branding/Marketing Strategy
- Develop a Community Engagement Strategy

My Notes:



City of Pickering Special Meeting of Council – Meeting Handbook

Toward the Development of a
Council-Driven Work Plan

3/20/23

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Agenda

Meeting Purpose & Objectives

1. To provide an overview of strategic planning in general as well as key trends that have the potential to impact the City of Pickering.
2. To collectively develop a Vision, Mission, Goals and Objectives.
3. To collectively identify key strategic actions to guide Council over the next four years and beyond.
4. To discuss next steps.

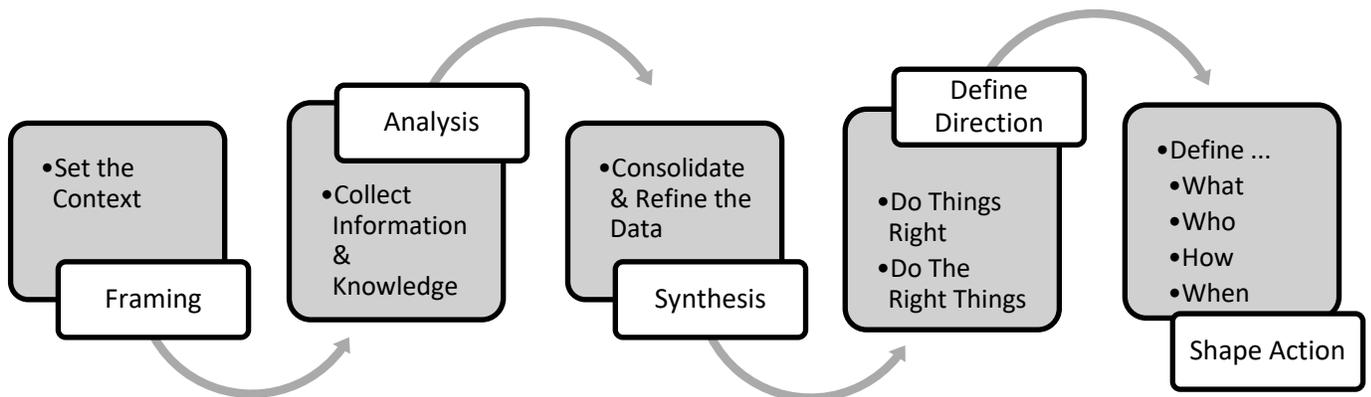
Time	Agenda Details	Lead
11:00	Official Welcome <ul style="list-style-type: none"> Key Outcomes Participant Introductions 	Mayor Kevin Ashe
11:10	Meeting Structure, Purpose & Key Objectives <ul style="list-style-type: none"> Overview of Meeting Materials Strategic Planning Overview Comments/Questions 	Karen Wianecki, Facilitator
11:20	Context Setting – Current Initiatives <ul style="list-style-type: none"> Accomplishments and initiatives in various stages of development Comments/Questions 	Marissa Carpino, CAO
11:30	One-on-One Interviews (Report Back) <ul style="list-style-type: none"> Vision Values Strengths Enhancements Opportunity Areas Questions/Comments 	Karen Wianecki
12:00	Context Setting – The Big Picture <ul style="list-style-type: none"> Environmental Scan – Trends & Their Implications for the City of Pickering What do these trends/drivers of change suggest for the Council-driven Work Plan? [Template #1 – Roundtable Discussion] 	Karen Wianecki
12:45	Lunch (Provided)	
1:30	Vision, Mission & Values for the City of Pickering (Template #2) <ul style="list-style-type: none"> What is your Vision for the City of Pickering? What makes Pickering truly unique? How can Pickering position itself for success? What is the City's reason for being (Mission)? 	Karen Wianecki

Time	Agenda Details	Lead
	<ul style="list-style-type: none"> Do you have specific values that you believe should be driving the Work Plan? 	
2:15	<p>Listening to & Learning from Others (Template #3)</p> <ul style="list-style-type: none"> What are your constituents telling you – About the future of Pickering? About their critical priorities? What if anything needs to stay the same? What if anything needs to change? Are there new areas of opportunity for the City? 	Karen Wianecki
2:45	Informal Refreshment Break	
2:45	<p>Goals/Outcomes (Template #4)</p> <ul style="list-style-type: none"> What specific goals/areas of focus must be included in the Work Plan? What are the critical 'must do's'? 	Karen Wianecki
3:15	<p>Strategic Actions – Developing Our Play Book...Together (Template #5)</p> <ul style="list-style-type: none"> The next four years will be successful if we initiate the following priorities The next four years will be successful if we complete the following initiatives 	Karen Wianecki
4:00	<p>Top Order Strategic Work Plan Priorities</p> <ul style="list-style-type: none"> In the next 6-12 months, Council must focus on the following top priorities In the next 12-24 months, Council must focus on the following top priorities In the next 24-48 months, Council must focus on the following top priorities <p>I will be most proud of my time on Pickering Council if we deliver on...</p>	Karen Wianecki
4:45	Recap & Next Steps	Karen Wianecki
4:55	Closing Remarks	Mayor Kevin Ashe
5:00	Meeting Concludes	

The Strategic Planning / Work Planning Framework

This Council-driven Work Plan is the first stage of the strategic planning process. It will form the platform for decisions Council will make, and staff will implement over this term of Council. This Work Plan will provide clarity about the collective strategic priorities of Pickering Council. It will also serve as a billboard to identify those areas that are top-of-mind for Council for the next four years, and beyond. The Work Plan will form the basis for engaging stakeholders, community members and City staff with respect to the development of the Strategic Plan.

This Handbook has been organized to assist you in preparing for the Special Meeting of Council. It is premised on the following framework and is adapted from Peter Richardson's 2001 work at Queen's University.



There are essentially five steps that we will use to develop a Council-driven Work Plan for the City of Pickering. These include the following:

- Step 1: Assessing the Business & Competitive Environment
- Step 2: Sizing Up the Organization
- Step 3: Putting the Pieces Together
- Step 4: Defining the Direction... Together
- Step 5: Take Action

Template #1: Assessing the Business & Competitive Environment

Your strategic work plan must fit the future environment. There are a number of drivers that will shape your future. These drivers include: political, economic, environmental, socio-cultural, geo-political and technological.

From your perspective, what are the major trends that will influence the City of Pickering in the future?

Trends/Drivers	Details – Trends & Their Potential Impact for the City
Demographic Trends	
Economic Trends	
Environmental Trends	
Political/Geo-political Trends	
Socio-cultural trends?	
Technological trends?	

Template #2: Vision, Mission, Values

Area of Focus	Your Thoughts
<p>VISION:</p> <ul style="list-style-type: none"> • What is your vision for the City of Pickering? • What makes Pickering truly unique? • How can Pickering position itself for success? 	
<p>MISSION:</p> <ul style="list-style-type: none"> • Why does the City of Pickering Council & the Corporation exist? • What purpose do you serve? 	
<p>VALUES:</p> <ul style="list-style-type: none"> • Are there specific values that should guide the development of the Council-driven Work Plan? • Are there existing documents that offer insight in this regard? 	

Template #3: Priorities Expressed By Your Constituents

When you campaigned for election/re-election, what did your constituents identify as their critical priorities? What do they expect Council to deliver on in the next four years? What are their short and longer-term priorities?

Constituent Comments	Details
What critical priorities were shared with you by your constituents?	
What if anything needs to stay the same?	
What if anything needs to change?	
Are there new areas of opportunity that your constituents have identified for the City?	

Template #4: Goals/Outcomes

What specific goals/areas of focus¹ must be included in the Council-driven Work Plan?
 What are the critical 'must do's'?

Goals	Details

¹ A Goal is an outcome-oriented statement that will lead the City toward its desired future. Some examples of goals that could be considered include: Healthy, Safe & Sustainable Communities; Building the Economy, Protecting the Natural Environment, Optimizing Cultural and Recreational Assets.

Template #5: Strategic Action & Priorities

From your perspective, what specific actions does Council need to focus on in the next four years? If the next four years are truly successful, what has Council initiated? What has Council completed?

Please indicate top-order priorities with an asterisk.

Council has Initiated The Following...	Council has Completed the Following...

Appendix A: Staff List of Accomplishments & Priorities

Key Accomplishments

City Development

Online building permit portal (PRISM) (in collaboration with Corporate Services)
Integrated Sustainability Development Standards
Kingston Road corridor intensification strategy
Enhancing film opportunities (W.F. White Backlot)

Community Services Department

Adapting to COVID lockdown and reopening
Recreation Complex renovations
Pickering Heritage Community Centre design, grant funding and supporting Museum site preparation - conservation building

Corporate Services Department

Successful conduct of 2022 Municipal Election
Facilitated remote and hybrid Council Meetings and staff meetings
Design and implementation of Waterfront Permit Parking Program
Completion of purchases and sales of Employment Lands to bring jobs to the City

Economic Development

Collaborative ongoing relationship with Province regarding Employment Lands
Economic Development Strategic Plan

Engineering Services Department

Integrated Transportation Master Plan
Asset Management plans for infrastructure
Implemented Automated Speed Enforcement program
Walnut Lane Extension Class Environmental Assessment

Finance Department

Implementation of Enterprise Resource Planning Solution (SAP)

Continuing adherence to Financial Control Policy throughout and after the pandemic

Fire Services

Completion of new Fire Hall on Zents Drive
Implementation of Peer Support Program
Education of PTSD and Stress staff training to support staff in need

Human Resources Department

Implementation of Success Factors (Human Resource module of the City's SAP Enterprise Resource Planning system)
Remote Work procedure, including post-COVID

Operations Department

Opening of NAPA Auto Parts store in Operations Centre garage to supply auto parts required for City operations
Corporate Security Specialist added in 2019
Department move to new Operations Centre
Energy Management Plan and implementation
Enhanced Winter Control Program
Parks Asset Management Plan
Chestnut Hill Developments Recreation Complex renovation
Fire Station #1 design and construction
Pickering Museum Village Blacksmith Shop renovation

Strategic Priorities for the City

Office of the CAO

Growth Readiness - the City will experience an exceptional rate of growth in the next few decades. The City must be prepared to accommodate that growth which includes an investment in staff and new municipal infrastructure.

Infrastructure Renewal - a strategy to make timely investments in the City's aging infrastructure (Asset Management Plan).

Digital Readiness Assessment and Service Modernization Strategy to streamline resources/services and optimize user experience. Invest in technology to meet resident expectations.

Invest in Pickering's Natural Heritage & Cultural Heritage. Commit to Environmental Sustainability.

Safety & Security - invest in IT staff and systems to assure network security incorporate security features into all new construction designs; Corporate Security Plan.

Invest in Community – Equity, Diversity & Inclusion Strategy, Community Safety & Well-being plan, Community engagement & education, new community spaces.

Economic Development - implement the Economic Development strategy to maximize economic investment in Pickering, reduce reliance on the residential tax base and delivers jobs here at home for our residents.

Financial Health - maintain the financial health of the City by maximizing available revenues sources and leveraging key City assets.

City Development Department

Alignment of different initiatives with Corporate Strategic Plan
Building community relationships in an evolving society
Kingston Road Corridor Development

Community Services Department

Serving a growing, changing community
Updating Cultural Plan
Review of event infrastructure
Need for a comprehensive Facilities Plan

Corporate Services Department

Managing growth
Managing inevitable urbanization
Planning for increasing demands on network and information technology infrastructure

Economic Development

Strategic alignment among all Departments to facilitate economic prosperity

Engineering Services Department

Infrastructural renewal and reducing the infrastructure funding deficit
Corporate efficiencies to enhance delivery of services (includes succession planning, staff development and retention, space planning/needs)
Development in the City Centre and the Innovation Corridor, Cherrywood, Northeast Pickering (Veraine), Planning Precinct (including Kingston Road Corridor)

Finance Department

Focus on prioritizing service delivery to the majority of residents
Focus on core municipal services and infrastructure

Fire Services

Complete Fire Fighter certifications per new Provincial requirements
Expansion of Fire Prevention and Public Education programs

Human Resources Department

Managing growth

Operations Department

Frenchman's Bay - ongoing maintenance issues

Updating Purchasing Policy

Hiring and retaining talented staff

Operations facilities expansion to service a growing City

Space use planning and ability to adapt City offices and facilities to serve a rapidly growing community