



City of Quinte West Strategic Plan Final Report

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Date: February 10, 2020

Table of Contents

1	Introduction	1
1.1	<i>Overview of this Report</i>	1
2	Approach to the Project	2
2.1	<i>Work Plan</i>	2
3	Project Activities and Reports	3
3.1	<i>Interim Report</i>	3
3.1.1	Research on Municipal Strategic Plans	3
3.1.2	Input from the Online “Mini-Survey” of Council	3
3.2	<i>First Workshop</i>	4
3.3	<i>Stakeholder Engagement</i>	4
3.4	<i>Second Workshop</i>	4
3.5	<i>Metrics Research</i>	5
3.5.1	Considerations in Developing Municipal Metrics	5
3.5.2	Categories of Municipal Metrics	5
3.6	<i>Planning Session with Senior Staff</i>	6
3.6.1	Strategic Priorities and Goals	7
3.7	<i>Final Presentation to Council</i>	8
	Appendices (Under Separate Cover)	9

1 INTRODUCTION

In the spring of 2019, Capital Park Consulting Inc. was hired by the City of Quinte West to assist in developing its new Strategic Plan. This report describes the project's activities and outputs. It includes Appendices under separate cover that are comprised of the various deliverables submitted to Quinte West by the Capital Park team.

Please note that Quinte West's new Strategic Plan, which is the result of this project, is a separate document that is being prepared and finalized by Quinte West staff for approval by Council. It will be available on the Quinte West website in the Spring of 2020.

1.1 OVERVIEW OF THIS REPORT

The purpose of this report is to summarize the process used to develop the new Strategic Plan for Quinte West, to present the research, and summarize the activities that are behind its creation.

The following sections of this report describe:

- The approach used to develop the new strategic plan including the project's work plan, timelines and changes to the original plan (Section 2)
- Project activities and reports including two workshops with Council and another working session with staff, and a series of reports including: Interim Report; Reports from Workshops 1 and 2 with Council; a Stakeholder Engagement Report; and working documents prepared for our session with staff (Section 3)
- The contents of the Strategic Plan (Section 4)
- Appendices (under separate cover)

2 APPROACH TO THE PROJECT

Our conceptual approach to the project included an assessment of the current situation, engagement with stakeholders to determine where it should be focusing its efforts and resources, and developing a plan for getting from the current state to the desired one. The approach is summarized briefly in the following flow chart graphic:



2.1 WORK PLAN

Our Work Plan for the assignment included the following tasks:

1. Project start-up & kick-off meeting
2. Review and research
3. Planning session #1 with Council & staff
4. Stakeholder engagement
5. Second session with Council & staff
6. Develop Strategic Priorities, Goals and Objectives with staff
7. Third session with Council and staff
8. Finalize the Strategic Plan Contents

Tasks 6 and 7 were added to the project's scope after it had been awarded to Capital Park Consulting.

3 PROJECT ACTIVITIES AND REPORTS

3.1 INTERIM REPORT

The Interim Report was prepared in the first few weeks of the project and circulated to Council in May 2019, a few days prior to the first workshop. It included our research into the strategic plans of other municipalities, our thoughts regarding “best practices” in municipal strategic planning, and a summary of the results of an online “mini-survey” of Quinte West’s Councillors.

3.1.1 RESEARCH ON MUNICIPAL STRATEGIC PLANS

The Capital Park team reviewed the strategic plans of more than 50 municipalities, focusing on ones with similar attributes to Quinte West including similar population, those with a mixture of rural and urban areas, within 150 kilometers of a major population centre, etc. Following this exercise, our team identified the attributes of the best strategic plans, and we selected six of our favourites for inclusion in the Appendices to the Interim Report.

We identified the following as “best practices” in municipal strategic planning:

- An inspirational message from the mayor and/or council
- An introduction to the community
- The purpose of the strategic plan
- A short, concise and aspirational vision statement, which defines the future ideal state of the municipality
- A mission statement that broadly defines the purpose of the municipality and how it will work toward the achievement of the vision
- High-level strategic priorities that are broad and far-reaching
 - We found that the best SPs presented 4-6 strategic priorities
- Clearly defined objectives and intended outcomes for each strategic priority
- An implementation framework describing such parameters as:
 - How the strategic priorities will be operationalized
 - How strategic priorities will be used during the budgeting process
 - How and when performance metrics will be identified
 - How the progress towards achieving the strategic plan priorities will be monitored, reported and communicated and with what frequency
 - The frequency with which the strategic plan will be updated
- The inclusion of photos of picturesque scenery in the municipality and the use of icons or infographics to visually demonstrate concepts, processes or data

3.1.2 INPUT FROM THE ONLINE “MINI-SURVEY” OF COUNCIL

In the weeks leading up to the first workshop with Council and Staff, we created an on-line “mini-survey” to ask Councillors a few questions about what they thought about Quinte West’s existing Strategic Plan and what they thought should be prioritized in the new one. See the Interim Report in Appendix A for the results of this survey.

3.2 FIRST WORKSHOP

The first workshop occurred on May 29, 2019 in Quinte West. The main activities during this workshop were:

- To review the work plan for the project
- To hear a summary of the feedback from the mini-survey of Councillors
- To conduct a SWOT (strengths, weaknesses, opportunities, threats) analysis for Quinte West
- To hear the results of Capital Park’s research into municipal strategic planning “best practices”
- To plan for the stakeholder engagement process including identifying the groups to be engaged, the questions to ask them and what feedback was anticipated

The First Workshop Report (including the PowerPoint presentation and the results of the SWOT analysis and other breakout group activities) appears in Appendix B.

3.3 STAKEHOLDER ENGAGEMENT

The stakeholder engagement process was carried out in the summer of 2019. It included the following interactions with different stakeholder groups:

- An on-line survey of **Quinte West residents** that was circulated to residents on June 23, 2019 and closed on July 31, 2019. This survey garnered 305 responses.
- An on-line survey of **Quinte West employees** that was sent to all staff on July 2, 2019 and closed on July 31, 2019. This survey garnered 67 online and 2 hard copy responses.
- A series of focus groups with **community and business groups** that were held on June 26, 2019 at Quinte West City Hall. These focus group sessions were attended by 12 representatives from 9 groups. We also received 5 online submissions from individuals or groups who were unable to attend in person.

The Stakeholder Engagement Report is included in Appendix C. It summarizes the full results of the above activities and was shared with Councillors in advance of the second workshop.

3.4 SECOND WORKSHOP

A second workshop was held in Quinte West in September 2019. Its main activities are summarized below:

- To discuss the results of the stakeholder engagement
- To review strategic planning “best practices”
- To brainstorm new Vision and Mission statements for Quinte West
- To brainstorm high-level Strategic Priorities (as “baskets”) and the projects and initiatives that should be included in those baskets

The Second Workshop Report is included as Appendix D. It includes the PowerPoint presentation and the results of the various brainstorming sessions.

3.5 METRICS RESEARCH

Inclusion of metrics is one of the municipal strategic planning best practices identified by Capital Park during its research. We researched municipal strategic planning “metrics” and prepared a brief report for Quinte West staff on the subject. The report presented considerations that should be taken into account when developing municipal metrics or KPIs (key performance indicators), and also presented a table summarizing containing potential municipal metrics.

3.5.1 CONSIDERATIONS IN DEVELOPING MUNICIPAL METRICS

Our team identified the following considerations that should be considered when developing appropriate metrics for a municipality:

- Commitment (by Council and staff) to developing KPIs to track progress
- Availability of statistical data (in-house or externally)
- Establishing baseline data against which to measure progress
- Determining the criteria for selecting KPIs and who will decide
- Developing a framework for categorizing KPIs (for example: service level measures; customer service measures; efficiency measures; and community impact measures)¹
- Determining the frequency of measurement and reporting
- Establishing targets for each metric to be used
- Determining where each metric fits into the corporate Strategic Plan
- A commitment to continuous improvement in areas where performance is below target

3.5.2 CATEGORIES OF MUNICIPAL METRICS

Our team identified over 100 potential municipal metrics, which were broken down into the following categories. The number of metrics included in each category is shown in parentheses.

- Arts & Culture (3)
- Commercial Building (6)
- Communications (5)
- Economic Development (11)
- Education (2)
- Environment (10)
- Finance (9)
- Housing (10)
- HR (9)
- IT (2)
- Parks & Recreation (11)
- Public Safety (13)
- Public Works (8)
- Residents (5)
- Transportation (9)

It is worth noting that development of municipal metrics has a nearly infinite number of possible customizations that are specific to a municipality. Selection of the “right” metrics depends upon the considerations identified above as well as other such as budget for development, specifics of the priorities identified in the municipality’s Strategic Plan, public appetite for metrics and many other factors.

The Metrics report that we shared with staff is included as Appendix E.

¹ These are taken from the OMBI (Ontario Municipal Benchmarking Initiative) that was undertaken by Queen’s University in 2008. See page 6 in http://post.queensu.ca/~grahama/case_studies/OMBIFINAL08_09.pdf.

3.6 PLANNING SESSION WITH SENIOR STAFF

After the second workshop, Capital Park conducted a one-day planning session in Quinte West with senior managers to discuss the outputs of the workshop and further develop the Strategic Priorities, Goals and Objectives to be included in Quinte West's new Strategic Plan.

The session's main goals are summarized below:

- To discuss the planned components that are likely to be included in the QW Strategic Plan
- To review the "Strategic Priorities" and "Projects and Initiatives" developed by Councillors at the September Workshop
- To review and discuss three sets of "Strategic Priorities" developed by the Capital Park team to potentially address the priorities identified by Council
- To review and discuss a preliminary draft of potential objectives/goals/actions that could potentially be described in under each of the strategic priorities included in "Option 1"
- To develop a slate of strategic priorities and objectives/goals/actions for Quinte West
- To discuss and identify potential KPIs or metrics that can be used to track Quinte West's progress in achieving the various priorities, objectives, goals included in the plan.

3.6.1 STRATEGIC PRIORITIES AND GOALS

The Strategic Priorities and Goals developed during the session with staff are summarized in the following table.

Healthy, Liveable Community	Infrastructure	Economic Prosperity	Environmental Stewardship	Operational Excellence
<i>Create a community that encourages healthy, active living for people of all ages and abilities</i>	<i>Ensure that infrastructure assets meet the emerging needs of our growing community</i>	<i>Create an environment that fosters prosperity for local businesses</i>	<i>Act as stewards of our natural environment through advocacy and proactive policies</i>	<i>Ensure operational excellence through open communication and exceptional customer service</i>
Encourage lifelong healthy living for all our citizens	Ensure that our transportation infrastructure allows people to get around safely and in a variety of ways	Support economic growth in Quinte West's commercial, industrial and tourism sectors	Include consideration of the environment in Quinte West's decision making (see Peterborough example)	Ensure that our customers are highly satisfied with the quality of our services
Ensure housing meets community needs	Ensure that Quinte West assets are sustainable to meet our long-term needs	Ensure the sustainability of Quinte West's economy and the City's financial position	Respond and adapt to climate change through planning, design and policy development	Motivate, enable and equip our employees to do their work effectively and build their careers in QW
Create a vibrant and healthy community through recreation, events, arts and culture	Leverage infrastructure funding opportunities through partnerships	Support business growth and attract new businesses that offer well-paid jobs in key sectors	Enhance the City's sustainability programs to minimize our environmental footprint	Provide the public with transparent and open government and encourage community engagement
Ensure appropriate services are available to all of our residents	Improve Quinte West's infrastructure through innovation and municipal best practices	Foster regional prosperity through partnerships that encourage economic development and tourism		Establish or maintain effective relationships with service delivery partners and stakeholders to improve service delivery
Make the most of our city, waterfront, trails and other natural assets, investing to make them more accessible				Ensure the sustainability of our municipal finances

3.7 FINAL PRESENTATION TO COUNCIL

On February 3, 2020 Tim Hore of Capital Park Consulting made a final presentation to Council describing the project to date and the draft contents of Quinte West's new Strategic Plan including the Vision, Mission, five Strategic Priorities and Goals and Actions for each of those five Strategic Priorities.

The PowerPoint presentation from that meeting is included as Appendix F to this report.

APPENDICES (UNDER SEPARATE COVER)

Appendix	Page
A - Interim Report	A-1
B - First Workshop Report	B-1
C - Stakeholder Engagement Report	C-1
D - Second Workshop Report	D-1
E - Metrics Research	E-1
F - Working Document for Staff	F-1
G - Draft Strategic Priorities for Council	G-1
H – Final Presentation to Council	H-1