

# Welcome to Day 1 – Council Workshop City of Welland Corporate Strategic Plan

## AGENDA

- Welcome – Dinner Provided - 5-5:30pm
- Workshop Start 5:30 pm
- Overview – 5 min
- VISION session – 45 min
- Mission Session – 45 min
- Values – 45 min
- Wrap up and Next Steps - 5 min

**COUNCIL**  
**OFFICE OF THE CAO**

APPROVALS	
DIRECTOR	LG.
CFO	
CAO	

22-154

**REPORT CAO 2022-02**  
**DECEMBER 6, 2022**

**SUBJECT:** DEVELOPMENT OF A CITY OF WELLAND CORPORATE STRATEGIC PLAN (CSP)

**AUTHORS:** CORPORATE LEADERSHIP TEAM (CLT)  
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CHIEF ADMINISTRATIVE OFFICER

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**RECOMMENDATION:**

THAT THE COUNCIL OF THE CITY OF WELLAND approve the development of a City of Welland Corporate Strategic Plan for the new term of Council 2022-2026 as outlined in report CAO-2022-02.

**ORIGIN AND BACKGROUND:**

It is recommended that the City of Welland Corporate Strategic Plan (CSP) have a date range of four (4) years (2023-2026) yet transcend far beyond the four years through Council's vision. A four-year period will allow for all to focus on areas of priority while foreseeing a longer-term vision for the City of Welland.

**What is a Corporate Strategic Plan (CSP)?**

A CSP is a roadmap for the broader community, council, and the administration. It identifies what we aspire to be and outlines our plan on how we intend to get there. A CSP highlights the collective mission and values of our city in our effort to meet the aspirational vision set by city council. This document will guide all municipal initiatives to ensure alignment and ultimate success of the corporation. Strategic planning is one of the most important tools that a municipality can use to bring together residents, members of council, and municipal staff.

To help provide context of a CSP to other important plans and strategies within the city, figure 1 below highlights the relationship and overarching reach of a CSP.

Fig. 1



It is important to highlight a few factors as related to Fig. 1:

- A CSP provides a high-level overview of the corporation that is aspirational and forward-looking.
- All plans and initiatives within the city, beginning with the City's Official Plan, are all aligned with, and connected too, the CSP.
- All subsequent plans and strategies, including both the operating and capital budgets, would align to the CSP. For example, when a project or initiative is introduced in the capital budget, it must align with a particular departmental plan, and ultimately align with the CSP.

To provide a wide cross section of strategic plan examples from other municipalities, below are a few hyperlinks of strategic plans for your reference and to benchmark. These plans are provided as examples and will be used as part of the development of a City of Welland Corporate Strategic Plan.

- [Town of Oakville](#)
- [Niagara Region](#)
- [Town of Parry Sound](#)
- [City of Stratford](#)
- [City of London](#)

#### What are the Benefits of a CSP for the City of Welland?

1. It allows Welland to be proactive rather than reactive.

A CSP will allow Welland to foresee our future and to prepare accordingly. Through strategic planning, we can anticipate certain favourable and unfavourable scenarios before they happen



and take necessary precautions to avoid them. With a strong strategic plan, we can be proactive rather than reacting to situations as they arise. Being proactive will allow us to keep up with the ever-changing trends and remain the top municipality in Niagara, and beyond.

2. It creates a sense of aspirational vision and direction.

A strategic plan will help to define our direction, as provided by City Council, and aid in the establishment of realistic goals and objectives that are in line with our vision, mission, and values. A strategic plan offers a much-needed foundation from which an organization can grow, evaluate its success, and establish boundaries for efficient decision-making.

3. It increases operational efficiency.

A strategic plan will provide the administration with a roadmap to align the organization's functional activities to achieve our collective goals. It will guide management discussions and decision-making to establish resource needs, service levels, and budget requirements to accomplish these objectives, thus increasing operational efficiency. It is the glue that connects all departments and aligns us with the direction provided by City Council.

4. It will help to establish our place and position in the overall market.

Through a CSP, the City of Welland can gain valuable insights on municipal and market trends, and ensure alignment with upper tier, provincial, and federal mandates. It will allow City Council and the administration to prepare for and plan our next steps on what will work best for the City of Welland, allowing us to become the known leader with a lens on our community and residents.

5. It sends a signal to the business and development community of our intentions.

A strategic plan will help to inform the business community of the City of Welland's economic intentions and objectives, creating market energy to invest in Welland, and to support our community needs and interests. For businesses and industries that are currently here, it provides insights and perspectives on our way forward with a keen interest to align and grow so all can prosper.

### **So, what is currently guiding the City of Welland today?**

Below represents what the City of Welland currently has in place, which highlights the City's council-approved mission and strategic priorities. This information will be used as our collective starting point for the development of a 2023-2026 Corporate Strategic Plan.

#### *"Our Mission:*

*To plan for and provide a vibrant, safe community which promotes healthy living and supports business growth. To respond to the diverse needs of our community in a timely, innovative, and effective manner, through teamwork and partnerships.*

#### *Council's Strategic Priorities*

*Welland is maturing into a smarter and adaptable city; therefore, strategic priorities are paramount to help guide City Council with clear and focused decision making. City Council's 2019/2022 Strategic Priorities take a holistic approach to improving lives by investing in social infrastructure.*

The following 2019/2022 Strategic Priorities are the pillars of Council's 2019-2022 vision.

- Canal Lands and Waterway Redevelopment
- Financial Management and Sustainability
- City Infrastructure
- Business Development and Job Creation
- Communications, Community Engagement, and Organizational Culture
- Health & Well-being"

**COMMENTS AND ANALYSIS:**

The City of Welland Corporate Strategic Plan will follow a similar format as other municipal plans. This includes three main sections shown below (1,2,3), introduced by a city preamble / overview, and concluded through next steps including annual progress reporting and update requirements. The chart below highlights the basic structure of a CSP.

Preamble	1	2	3	Conclusion
An overview of the city and our elected officials	Vision, Mission, and Values	Strategic Priorities / Areas of Focus	Objectives, Goals and Actions	Identifying process for next steps and annual reporting

1. The City of Welland's Corporate Strategic Plan will be guided by three fundamental elements: **our Vision, our Mission, and our Values.**
  - Our vision is aspirational and is the desired future state. It describes a future view of our community that we are committed to achieve.
  - Our mission describes both our purpose and our practices. It acknowledges that the City serves multiple stakeholders, with importance of their interests. Our mission also speaks directly to our employees. Without them the tremendous effort and contributions could not be realized.
  - Our values are founded on our collective vision, mission, and values that guide all our actions and decisions. These values reflect what we expect from Council, the broader community, and the administration.
2. The **Strategic Priorities or Areas of Focus** are broad pillars of the organization. For example, Environmental Stewardship or 'Good Governance could be used as pillars of the corporation. Typically, strategic plans have between 4-6 Strategic Priorities / Areas of Focus, which align to the objectives and goals of the corporation. The City of Welland Strategic Priorities previously mentioned in this report will be used as our collective starting point when creating and refreshing priorities / areas of focus for the 2023-2026 CSP.
3. **Objectives, Goals and Actions** are specific targets that have a beginning and an end date. For example, to 'Update the Fire Master Plan', or to 'Create Service Levels for Parks', or to 'Develop a Tree Canopy Strategy' or to 'Develop a Transportation Master Plan'. These objectives, goals, and actions would be clearly scoped to ensure Council, the community, and



the administration understand the initiative with associated timelines and milestones which demonstrate how they are aligned to which area of focus.

**So how will we accomplish developing a CSP?**

Staff are recommending a workshop format with both City Council and the community. The Corporate Leadership Team (CLT) will provide guidance and facilitate the workshops, capturing the information heard by Council and the community. It is recommended that this workshop be developed in-house through a One Team, One Welland approach.

Ambitiously, staff are recommending the completion of the CSP by Q1 / Q2 of 2023. Staff will host three council workshops; one each in January, February, and March, followed by community engagement to review the draft and provide comment and input. Engagement will reach residents, the business / development community, and various service providers / agencies.

The three workshop dates with Council will focus on the three sections of a CSP, as noted above and summarized below:

<b>Workshop #1</b>	<b>Workshop #2</b>	<b>Workshop #3</b>
Vision, Mission, Values	Strategic Priorities / Areas of Focus	Objectives / Goals / Actions
<b>January</b>	<b>February</b>	<b>March</b>

During the month of April, engagement will commence, with an expected report and the final approval by City Council in May / June 2023. The Corporate Leadership Team (CLT) is eager to work with members of Council on the creation of a made-in-Welland, CSP.

**FINANCIAL CONSIDERATIONS:**

The City of Welland CSP is recommended to be facilitated by the CLT, resulting in no consulting fees to be spent. Staff time will be assigned and dedicated to this undertaking, with nominal expenses for any print materials and the production of the final document.

**OTHER DEPARTMENT IMPLICATIONS:**

It is anticipated that all departments will be fully engaged throughout the process, with executive leadership provided through the office of the CAO.

**SUMMARY AND CONCLUSION**

A Corporate Strategic Plan is one of the most powerful tools within a municipality. It sets an aspirational vision, aligns staff and resourcing, and sets targets. It provides opportunity for updates and is meant to be proactive. Areas of focus provide stability and direction for all when actions and objectives need to be created. It is intended for staff and council to complete this important guiding document early in 2023 and for the document to remain live, relevant, and active for the term of council up to 2026.

**ATTACHMENTS:**

None.

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- **MISSION** Session – 45 min
- **VALUES** – 45 min
- Wrap up and Next Steps - 5 min





# Welcome to Day 1 – Workshop

## City of Welland Corporate Strategic Plan

Note Taker

T. Stephens  
(City Clerk)

### TABLE 1

- \* Sherri-Marie (Facilitator)
- \* T. DiMarco
- \* C. Richard
- \* S. Setaram

### TABLE 2

- \* Adam Eckhart (Facilitator)
- \* J. Lee
- \* J. Chiocchio
- \* L. Van Vliet
- \* F. Campion

Creative / PR

M. MacDonald  
(Comm. Mgr)

### TABLE 3

- \* Grand Munday (Facilitator)
- \* B. Fokkens
- \* D. McLeod
- \* A. Moote

### TABLE 4

- \* Steven Fairweather (Facilitator)
- \* G. Speck
- \* B. Green
- \* M. Grimaldi



# CSP Workshop Day 1

<b>Vision</b> 	<b>Mission</b> 	<b>Values</b> 
45 min	45 min	45 min

- Workshop Format. No meeting formalities required
- Brainstorming, creative session. No idea is a bad idea
- Respectful dialogue, be curious, active listening
- Think full city, outside of ward boundaries
- Think moving forward and future focused
- Respect the democratic process and outcomes

A goal  
without a  
plan is just  
a wish.

- Antoine de Saint-Exupéry

# VISION



Vision,  
Mission, Values



Strategic  
Priorities



Objectives /  
Goals / Actions



- Vision: Aspirational & Inspirational Statement
- Think externally: how others view us
- Think internally: what we think about ourselves
- Clear and Succinct
- Describes our future state
- Highlights our commitment

# VISION EXAMPLES

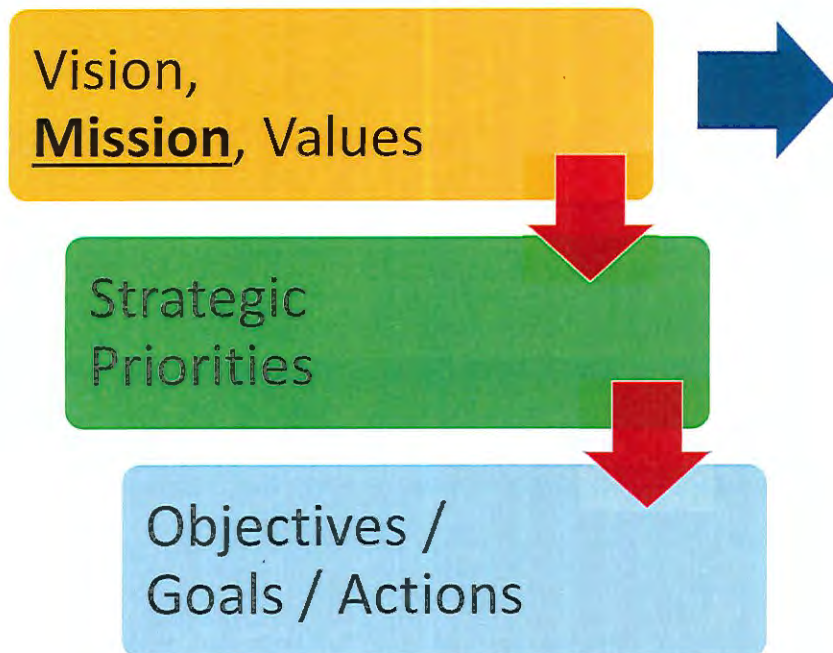
- **A Great City to Work, Play, Live and Invest!**
- To be the most livable town in Canada
- Niagara Region is a mosaic of diverse communities. We strive to achieve a prosperous, safe and inclusive community that embraces our natural spaces and promotes holistic wellbeing and quality of life
- The Jewel of Georgian Bay, a sustainable community focused on opportunity, growth and healthy living
- A vibrant city, leading the way in community-driven excellence
- A leader in commerce, culture and innovation – our region's connection to the World
- Where people, nature and business thrive



# Activity 1 – VISION 45 Minutes

- Brief discuss at table of various other **Vision Statements** (5 min)
- Each group to brainstorm **Themes** to be included in a Vision Statement. (e.g. Prosperity, Nature, People, Quality of Life.) (20 min). Themes to be recorded on post-it notes by each individual and placed on flip chart for group discussion
- Each group to identify through dotmocracy your **Top 4 Themes** to be included in the creation of a Vision Statement (5 min)
- Broader group discussion and review of the 4 groups themes. (15 min)
  - Discussion on Themes Generated by each team member and discussed
  - Common Themes Noted amongst all 4 groups
  - Group Dotmocracy on which 4-6 themes should then be included moving forward in the creation of a City of Welland, VISION statement
- Staff to take away to develop a final Vision Statement to be presented for Workshop Day 2

# MISSION



- Describes both our purpose and our practices
- Identifies our plan on how we intend to get there
- It acknowledges that we serve multiple stakeholders
- Speaks directly to our employees
- Clear and understandable
- One bold statement

**Our Current Mission:** To plan for and provide a **vibrant, safe** community which **promotes healthy** living and supports **business growth**. To respond to the **diverse needs** of our community in a timely, **innovative** and **effective** manner, through **teamwork** and **partnerships**.



# MISSION EXAMPLES

- **Our Current Mission:** To plan for and provide a **vibrant, safe** community which **promotes healthy** living and supports **business growth**. To respond to the **diverse needs** of our community in a timely, **innovative** and **effective** manner, through **teamwork** and **partnerships**
- A responsive and modern public service partner that fosters change to build a better London for all
- To provide services to support a sustainable, caring community with exceptional quality of life
- Niagara Region will serve its residents, businesses and tourists through collaborative leadership, responsible policy and the provision of effective and efficient community-focused services, while maintaining environmental and economic sustainability



## Activity 2 – MISSION 45 Minutes

- Briefly discuss at table likes and dislikes of our current Mission statement (5 min)
- Each group to brainstorm **Themes** to be included in a future Mission Statement. Themes to be recorded on post-it notes and placed on flip chart for group discussion (20 min)
- Each group to identify through dotmocracy your top 6-8 Themes to be included in the creation of a Mission Statement (5 min)
- Broader Group discuss and review of the 4 groups (15 min)
  - Discussion on Themes Generated by each team and discussed
  - Common Themes Noted amongst all 4 groups
  - Group Dotmocracy on which 6-8 themes should then be included moving forward in the creation of a City of Welland, Mission Statement
- Staff to take away to develop a draft Mission Statement with reference to be presented on Workshop Day 2

# VALUES



Vision, Mission,  
Values



Strategic  
Priorities



Objectives /  
Goals / Actions



- Identify who we are
- Our values are founded on our collective vision and mission, that guide all our actions and decisions
- They reflect what we expect from Council, the broader community, and the administration
- Values are core to everything we do, everyday

# VALUE EXAMPLES

- Integrity, Respect, Caring, Progress, Collaboration
- Collaboration, Honest, Accountability, Respect, Transparency
- Equity, Innovation & Continuous Improvement, Integrity, Stewardship, Foster Partnerships
- Accountability, Dedication, Honesty, Innovation, Respect, Teamwork



## Activity 3 – VALUES 45 Minutes

- Briefly discuss at table various Values noted in the resources provided (5 min)
- Each group to brainstorm **Value words**. Values to be recorded on post-it notes and placed on flip chart for group discussion (20 min)
- Each group to identify through dotmocracy your top 4-6 Values you would like to bring forward for the broader discussion (5 min)
- Broader Group discuss and review of the 4 groups (15 min)
  - Discussion on Values generated by each team and discussed
  - Common Values noted amongst all 4 groups
  - Group Dotmocracy on which 4-6 values should then be included moving forward in the creation of a set of Core Values for the City of Welland
- Staff to take away Values developed and provide further meaning / definition to them to present on Workshop Day 2

# Thank you for your Participation!





# Next Workshop

