

# STAFF REPORT

THE CORPORATION OF THE TOWN OF COBOURG



|  |  |                      |   |
|--|--|----------------------|---|
| <b>Report to:</b>                          | Mayor and Council Members                    | <b>Priority:</b>     | <input checked="" type="checkbox"/> High <input type="checkbox"/> Low                       |
| <b>Submitted by:</b>                       | Tracey Vaughan, Chief Administrative Officer | <b>Meeting Type:</b> | Open Session <input checked="" type="checkbox"/><br>Closed Session <input type="checkbox"/> |
| <b>Meeting Date:</b>                       | September 26, 2022                           |                      |   |
| <b>Report No.:</b>                         | Office of the CAO-024-22                     |                      |   |
| <a href="#">Submit comments to Council</a> |  |                      |   |

**Subject/Title:** 2022 Strategic Plan Report

## RECOMMENDATION:

THAT Council receive the 2022 Strategic Plan Report for information purposes;

### 1. STRATEGIC PLAN

As per the contents of this report.

### 2. PUBLIC ENGAGEMENT

This report has been circulated to the public 10 days in advance of the Committee of the Whole meeting.

### 3. PURPOSE

The Town of Cobourg's 2019-2022 Strategic Plan has guided the Town's corporate priorities and decision-making process. The primary purpose of the Strategic Plan is to communicate the community priorities and to focus the Corporation of the Town of Cobourg's resources along with those of the Municipal Council. A Strategic Plan final review provides an excellent opportunity both for Administration and Council to review the actions that were completed on those corporate priorities over the term of the Strategic Plan.

Strategic Plans are a snapshot in time, and often priorities shift over a four-year (4) term in response to changing conditions, new and emerging priorities, and/or unanticipated resource constraints. This term of Council provided unexpected challenges with respect to staff capacity, available resources, emerging priorities and pressures primarily driven by the Covid-19 pandemic.

In recognition of the dynamic nature of Strategic Planning, Council participated in a public Mid-Term Review Session on Thursday, April 1, 2021, to review the Strategic Priorities. The key task of the workshop, beyond reviewing priorities, was to refresh and revise the 2019 - 2022 Strategic Priorities as needed in this new environment. Included in this review were the consideration of COVID-19 impacts on the community, any changes which occurred in the first two years of the Council term, and the assurance of a coordinated vision moving forward. The Strategic Plan is a living document to be used in the day-to-day work of the Council and staff.

#### **4. ORIGIN AND LEGISLATION**

The Corporation of the Town of Cobourg's 2019 - 2022 Strategic Plan guides the setting of corporate priorities and decision-making. The primary purpose of the Strategic Plan is to communicate community and Council priorities and to focus the resources of Municipal Council and Town staff.

#### **5. BACKGROUND**

In early 2019, Council facilitated and adopted the 2019 - 2022 Strategic Plan for the Town of Cobourg. The Chief Administrative Officer established a work plan for Directors and their Divisions. Following, Council provided direction to the CAO to schedule a Mid-Term Review session with Council to provide an opportunity for staff and Council to review, re-evaluate, refresh, and revise the priorities contained within the Strategic Plan and to guide the last two years of the Council term.

#### **6. ANALYSIS**

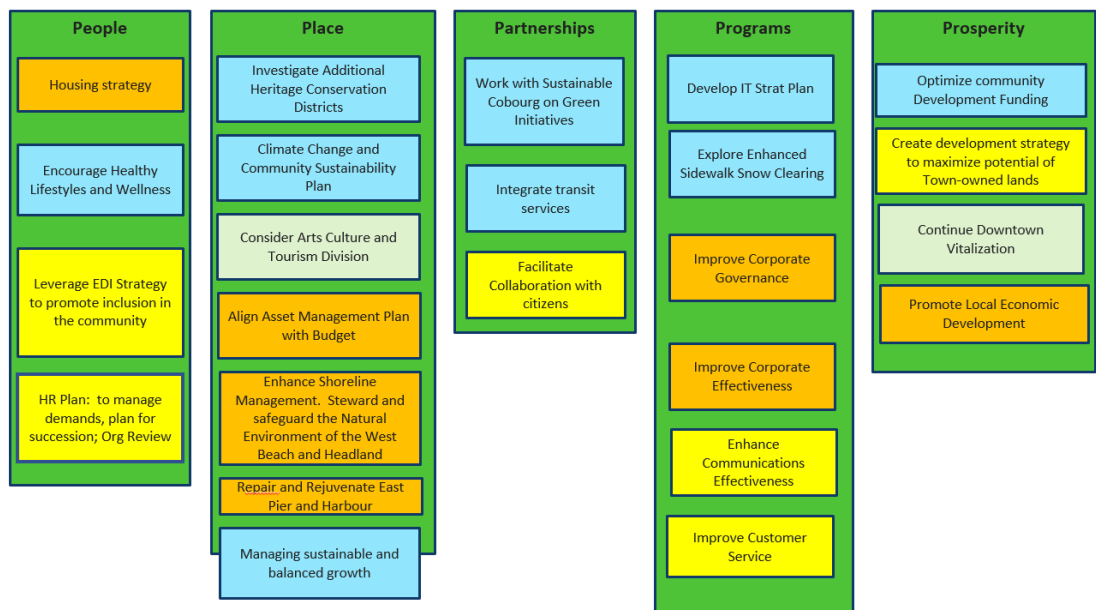
The Town worked with StrategyCorp to conduct a Mid-Term Review Session to review the original Strategic Plan within the changing community context and emerging priorities over the Council term. The Strategic Plan serves as the roadmap for Council, Staff, and our community. Prior to the session, staff engaged the public through the Engage Cobourg platform to collect feedback on the current priorities of the plan. The workshop, facilitated by John Matheson of StrategyCorp served to review the Strategic Plan and determine the priorities for each area with respect to what was most important to continue to pursue for the remainder of the Council term. As anticipated, there were a few areas that were determined to be top priority and others that were important, but it was acknowledged that much work had been done on the initiative and staff were to continue the existing course.

The process outlined and executed by StrategyCorp was as follows:

- Prior to the session, Senior Management Team (SMT) members and all members of Council were interviewed by the facilitator between the dates of March 16<sup>th</sup> and March 29<sup>th</sup>.
- Based on the interviews, a draft SWOT Assessment (Strengths, Weaknesses, Opportunities and Threats) was prepared for consideration by Council.
- In addition, the existing Strategic Plan was annotated to reflect the aggregated priorities of different initiatives, as identified by Council in the interviews.
- Council considered and validated the draft SWOT and priorities over the course of a six- hour meeting facilitated by John Matheson of StrategyCorp.

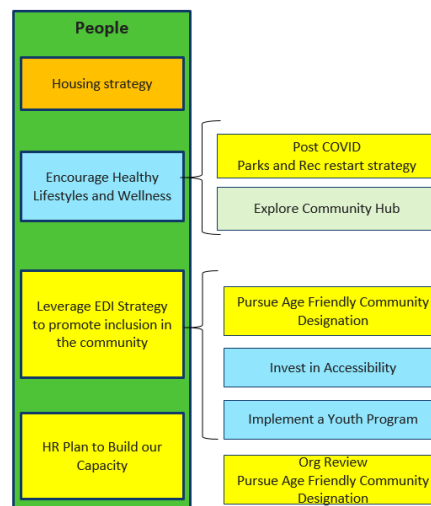
Following StrategyCorp’s initial meetings with individual Council members, the following reflects the current priorities as indicated by Council:

## Strategic Plan as Revised by Council (arranged in the Original Order from 2018 plan)



## People (as revised by Council)

- The Green Box reflects the amended “People” section as validated by Council.
- Items outside the box are to become specific activities tracked by staff in operating plans, but have been removed as high order priorities for the Plan.



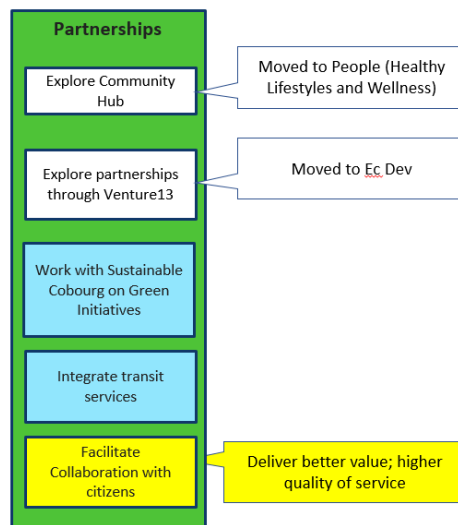
## Places (as revised by Council)

- The Green Box reflects the amended “Place” section as validated by Council.
- Items outside the box are to become specific activities tracked by staff in operating plans, but have been removed as high order priorities for the Plan.



## Partnerships (as revised by Council)

- The Green Box reflects the amended “Partnerships” section as validated by Council.
- Items outside the box are to become specific activities tracked by staff in operating plans, but have been removed as high order priorities for the Plan.



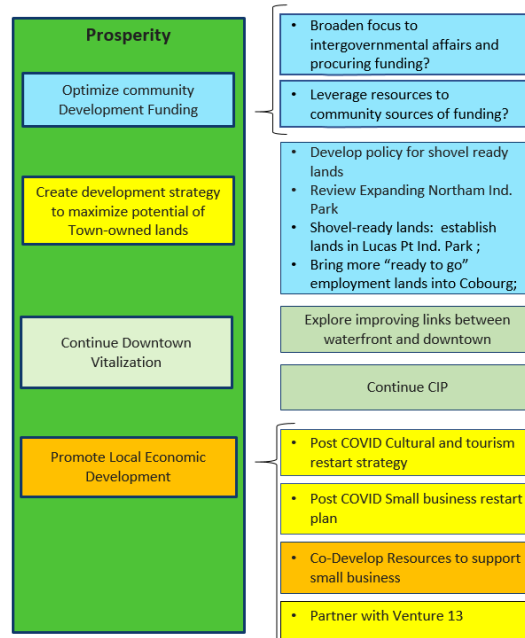
## Programs (as revised by Council)

- The Green Box reflects the amended “Programs” section as validated by Council.
- Items outside the box are to become specific activities tracked by staff in operating plans, but have been removed as high order priorities for the Plan.



## Prosperity (as revised by Council)

- The Green Box reflects the amended “Prosperity” section as validated by Council.
- Items outside the box are to become specific activities tracked by staff in operating plans, but have been removed as high order priorities for the Plan.



Council reaffirmed their top priorities as:

- Housing Strategy (People)
- Align Asset Management with Budget (Places)
- Enhance Shoreline Management. Steward and safeguard the Natural Environment of the West Beach and Headland (Places)
- Repair and Rejuvenate East Pier and Harbour (Places)
- Facilitate Collaboration with citizens (Partnerships)
- Improve Corporate Governance (Programs)
- Improve Corporate Effectiveness (Programs)
- Promote Local Economic Development (Prosperity)

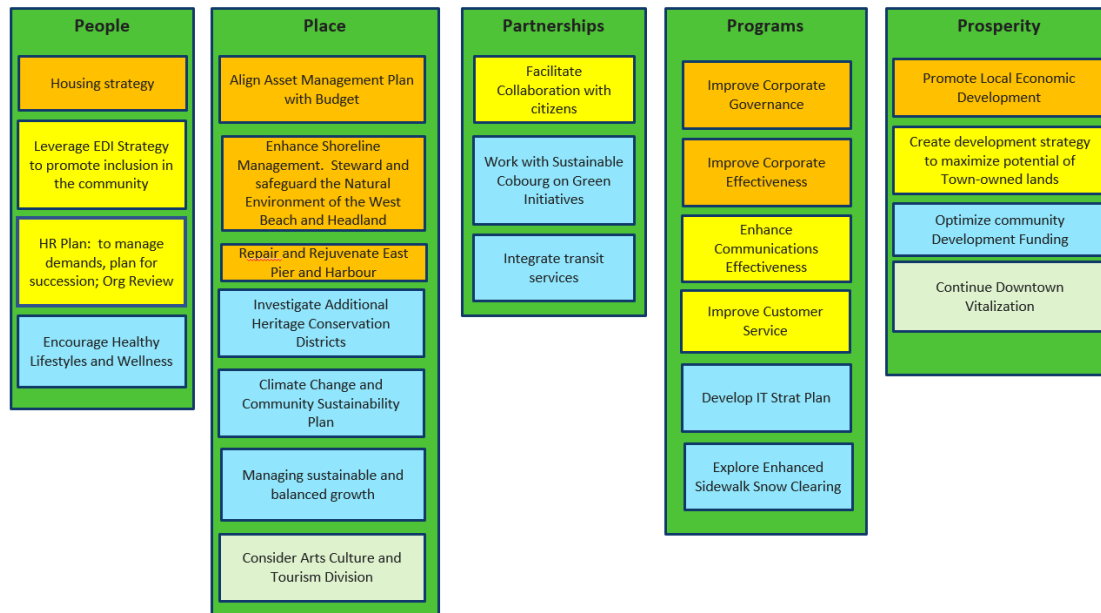
The lower priorities to be deferred include:

- Consider Arts, Culture & Tourism Division (**Places**)
- Continue Downtown Vitalization (**Prosperity**)

It was recommended by the consultant based on Council feedback that the following initiative be added to the Strategic Plan, determining that “more worked is needed this term.”

- Improve Customer Service (**Programs**)

### Strategic Plan as Revised by Council (re-arranged in priority order)



The Mid-Term Implementation Plan was approved by Council and staff began the process of updating all divisional operating plans to ensure that they continued to align with the renewed Council priorities. Those divisional work plans aligned the operations of each division with the Strategic Plan, while continuing to advance the work required in all other corporate plans and strategies.

Once those plans were updated, staff ensured that reports, activities, budget requests and resource deployment had demonstrated alignment with the strategic plan whenever possible. This ensured that we could demonstrate organizational alignment between the Strategic Plan and operations and enable staff to demonstrate performance towards the objective of the plan.

The Town of Cobourg has laid a solid foundation for its Strategic Priorities with 38 strategic actions being completed and a further 36 are well under way with several anticipated to be complete later this year or early in the next Council term. While not all activities (17 remaining) were possible to complete due to the constraints mentioned previously in the report (impacts of the pandemic, staffing shortages, and resource constraints) Council and the public can see that significant process was made during this term.

| <b>PEOPLE</b>  | <b>STATUS</b>       |
|--|---------------------|
| <b>ACTION 1:</b> Create a housing strategy that is in line with Northumberland’s Housing Strategy.   | 6 ✓<br>1 ...<br>1 → |
| <b>ACTION 2:</b> Leverage Equity, Diversity and Inclusion (EDI) Strategy to promote inclusion in the Community.                                    | 6 ✓<br>5 ...<br>1 → |
| <b>ACTION 3:</b> Develop a Human Resources Plan to manage demands and plan for succession.   | 2 ✓                 |
| <b>ACTION 4:</b> Encourage healthy lifestyles and wellness.  | 3 →                 |
| <b>PLACES</b>  | <b>STATUS</b>       |
| <b>ACTION 1:</b> Align Asset Management Plan with budget.  | 2 ✓<br>1 ...        |
| <b>ACTION 2:</b> Enhance Shoreline Management. Steward and safeguard the natural environment.  | 1 ✓                 |
| <b>ACTION 3:</b> Repair and rejuvenate the East Pier and Harbour.  | 2 ✓<br>2 ...<br>1 → |
| <b>ACTION 4:</b> Investigate the creation of additional heritage districts as outlined in the Heritage Master Plan.                                | 4 →                 |
| <b>ACTION 5:</b> Create a Climate Change and Community Sustainability Plan.  | 2 ✓<br>1 ...        |
| <b>ACTION 6:</b> Manage sustainable and balanced growth.   | 1 ...               |
| <b>ACTION 7:</b> Upon completion of Cultural Master Plan, consider the creation of Town of Cobourg Arts, Culture and Tourism Division.             | 1 ✓<br>1 ...        |
| <b>PARTNERSHIPS</b>  | <b>STATUS</b>       |
| <b>ACTION 1:</b> Facilitate meaningful collaboration with Cobourg citizens.  | 2 ✓                 |
| <b>ACTION 2:</b> Continue to work with Sustainable Cobourg and other stakeholders on Cobourg green initiatives.                                    | 1 ✓<br>3 ...<br>1 → |
| <b>ACTION 3:</b> Work with transit authorities in the area to integrate transit services, including accessible and active transportation services. | 1 ...<br>4 →        |
| <b>PROGRAMS</b>  | <b>STATUS</b>       |
| <b>ACTION 1:</b> Improve corporate governance.   | 4 ✓<br>5 ...        |
| <b>ACTION 2:</b> Improve corporate effectiveness.  | 1 ...               |
| <b>ACTION 3:</b> Enhance communication effectiveness.  | 1 ✓<br>1 ...<br>1 → |
| <b>ACTION 4:</b> Improve customer services.  | 1 ...               |
| <b>ACTION 5:</b> Develop Information Technology (IT) Strategic Plan.   | 2 ✓<br>1 ...        |
| <b>ACTION 6:</b> Explore enhanced sidewalk snow clearing including the clearing of arterial bike lanes and multi-use paths.                        | 1 ✓                 |

| <b>PROSPERITY</b>  | <b>STATUS</b>         |
|--|-----------------------|
| <b>ACTION 1:</b> Promote local economic development.   | 2 ✓<br>5 ...          |
| <b>ACTION 2:</b> Create a development strategy to maximize potential of Town-owned lands.                                    | 3 ...                 |
| <b>ACTION 3:</b> Coordinate funding opportunities to optimize development capital and special project funding opportunities. | 1 ✓<br>2 ...          |
| <b>ACTION 4:</b> Continue implementation of Downtown Vitalization Action Plan (DVAP).  | 4 ✓<br>2 ...<br>1 →   |
| <b>TOTAL of 91 ACTION ITEMS:</b>   | 38 ✓<br>36...<br>17 → |

Complete ✓  
 In progress...  
 Still to be implemented →

An updated Strategic Plan document has been attached to this report that demonstrates the status of all deliverables that have been actioned by Council. Below are some of the highlights from each section that have been shared for Council and the public.

**People:**

When Council set their strategic plan (2019-2022) they clearly prioritized and recognized investments in our most valuable assets – our people. Strategic initiatives outlined in this pillar address the modern needs of the community while ensuring the retention of a highly skilled and talented workforce to see these plans through.

To address Cobourg’s housing shortage, Cobourg has aligned its housing strategy with Northumberland County while managing the consideration of our own Community Improvement Plan applications. As a priority and initial strategy, it is imperative that we build momentum on the Cobourg CIP program by distributing funding to serve an immediate local housing need. As the program grows and as collaboration continues, staff will support additional ways to harmonize with the County.

Through our Accessibility, Equity, Diversity and Inclusion initiatives, the Town is making great strides to position Cobourg as a welcoming community for all. The development and implementation of an updated, Multi-Year Accessibility Plan will certify Cobourg meets provincial accessibility standards, and beyond that will put people first in all future developments by applying ‘Accessibility for All’ considerations in all planning deliberations.

This term of Council also saw the review and implementation of an Organizational Review. Further execution of strategies, as outlined in the CAO’s report, will ensure the delivery of responsible, efficient, and effective services to our growing community as well as the development of a Human Resources workplan to manage demands and plan for succession. The Town of Cobourg has a highly skilled group of people, working together to deliver exceptional municipal programs and services. This plan will serve as the blueprint for improving and enhancing our human resource management practices



so we may continue to attract valuable talent while retaining our highly skilled dedicated and experienced employees.

## **Places:**

Our historic community is challenged with managing aging infrastructure, while meeting the demands of a growing population. The development and implementation of our Asset Management Plan will ensure fiscal responsibility, data based planning and better decision making. The hire of the new Assistant Manager of Engineering will help to ensure successful compliance to the Asset management Program as this position will be tasked with ensuring all departments have conducted current facility condition assessments, monitors all their divisional assets, both existing and new, based on an agreed-upon level of service from Council. This staff member will also work with Finance to ensure realistic long range capital forecasts that will inform future budget deliberations.

In May 2022, the Town of Cobourg engaged with members of the public on the naming of the West Headlands and West Beach Area. The official naming of the “Waterfront Nature Park” marks the final step in Council’s initiatives to safeguard this natural environment.

While work will continue into 2024, staff have developed the framework for the repair of the harbour with Council’s detailed review and support. Additionally, the East Pier design work is 75% complete.

Council approved the award of the contract, and the consultant has been advised. It is expected the User Fee Report will be presented to Council for consideration in early 2023.

## **Partnerships**

Cobourg is creating, fostering, and facilitating an environment where resident engagement and customer service is at the forefront of our day-to-day work. Divisions continue to employ Bang the Table, the Town of Cobourg’s Community Engagement website to seek public input on key projects and initiatives. Staff pursue partnerships with community groups on a project-by-project basis to maximize resources, facilitate meaningful collaboration and improve engagement with the community.

Staff continue to engage and partner with Sustainable Cobourg on green initiatives. The successful establishment of the Integrated Community Sustainability Plan, the Green Development Standards, and the Green Energy Retrofit Feasibility study are on track to be finalized in 2023, which will guide the Town of Cobourg to realize the aims of the climate emergency resolution and preceding plans.

The County of Northumberland has tasked their staff with investigating travel between lower tier communities in Northumberland as well as access to GO service. A pilot project, initiated by the County will provide transit services across the County to a GO

pick up location. Town staff are committed to working with Northumberland County staff as required to ensure that local solutions are developed and implemented to meet local needs.

## **Programs**

In the Strategic Plan for plan 2019-2022, Council set out to improve corporate governance, enhance communication effectiveness and improve customer service. Our ability to access and share information efficiently and effectively, safeguards trust and confidence in staff and Town operations.

The Town issued a request for proposal (RFP) for a qualified Customer Service Consulting Firm to develop the Town's First Customer Service Strategy and Implementation Plan. This will be in place for the first quarter of 2023 and implemented going forward. Council also approved the hiring of a Manager of Strategic Initiatives and Customer Service, which will ensure that there is a dedicated staff resource which will guide, facilitate and implement the Council approved Customer Service Strategy across the corporation. This position will also work with each Division to design and implement key performance indicators for customer service and quality that will begin to be tracked annually for Council and the public on an annual basis beginning in 2023.

Final research is currently underway in preparation to launch an Internal Communications Strategy in 2022. Through an effective internal communications program, employees will be better informed, feel empowered, have a better sense of belonging, improved morale, and greater connection to Town of Cobourg operations. The Internal Communications Strategy will streamline information between Council and staff as well as help to break down the silos that exist due to the disconnection of staff operating out of different buildings. This internal customer service strategy will also support the continued building and enhancement of organizational culture and branding which will foster enhanced employee morale, and will ultimately assist with attraction and retention efforts of employees.

The implementation of an IT strategic plan in 2022/23 will improve security and help ensure the future of business continuity for the Town of Cobourg. A draft report has been provided to the Senior Leadership Team for their review and comment, and a report and presentation will be coming to Council for review and endorsement in early 2023.

The Town of Cobourg is in its second final stage of the Electronic Records Management Program with an organization-wide mandate to ensure that recordkeeping and records retention requirements are met, that access is guaranteed while also ensuring security of Town records, and that the value of the records and information is recognized by all parties involved. The Town of Cobourg has officially converted all current and in scope Corporate Records onto a single shared cloud-based repository to better manage all records.

The Town of Cobourg Legislative Services Department recognizes records as valuable and essential corporate assets. An effective and efficient corporate records and information management (RIM) program is vital to ensure:

1. legislative and regulatory compliance;
2. improved transparency and accountability;

3. effective policy-making and informed decision-making;
4. risk management and business continuity in the event of disaster;
5. protection of rights and obligations of the organization and its citizens;
6. greater business efficiency and cost savings;
7. protection of corporate, personal and collective memory;

## **Prosperity**

Tourism strategic planning has started and stopped over the last two years due to COVID-19 resurgence and staff maternity leaves. During this time, the Marketing and Events department and Economic Development staff have partnered with the Communications Department, DBIA and Chamber of Commerce to support local businesses through hyper local tourism marketing initiatives. While post-covid cultural and tourism strategic planning will continue into 2023, the Marketing and Events Department and Economic Development will further support local businesses by introducing new cultural programming in the 2022/23 shoulder season, when historically visitation tends to slow down. Using funds received through a Reconnect Ontario Grant in 2022, staff will target Ontario residents who may otherwise fly south during the winter months.

The Town has successfully hired a Grant and Policy writer, and this position is tasked with seeking, securing, and reporting on grant and funding opportunities that align with Council's Strategic Priorities, the Town's Capital Program, and Operating Budget. A supplemental report has been presented to Council also on the September 19<sup>th</sup> Committee of the Whole Agenda for information purposes that will provide further detail on the year to date activities, work plan, strategies and suggested future reporting for this position with respect to funding.

## **7. FINANCIAL IMPLICATIONS/BUDGET IMPACTS**

There are no additional financial implications for the 2022 Strategic Plan Update Report, any 2023 costs that continue to advance the priorities of this Strategic Plan will be presented to Council in the 2023 budget process for consideration.

## **8. CONCLUSION**

Staff and Council have worked diligently during the 2018-2022 Council term to advance the initiatives set out in the Strategic Plan. The plan that was set by Council was highly ambitious, with several complex, multi-year or multi-term initiatives all designed to support, enhance and deliver a progressive and positive future for the Town of Cobourg. The organization faced many challenges during the Council term that impeded progress, however, we were successful in delivering and implementing on the majority of the activities set by Council, and we have set a solid foundation for those initiatives not yet complete to continue to be fully implemented in future terms of Council. Staff are pleased to present the 2022 Strategic Plan Report for Council to receive for information purposes.



## Report Approval Details

|                      |   |
|----------------------|---|
| Document Title:      | Strategic Plan Final Report September 2022 - Office of the CAO-024-22.docx                              |
| Attachments:         | - Cobourg Strat Plan Report of the Facilitator.pptx<br>- Strategic Plan_Progress Report Update_2022.pdf |
| Final Approval Date: | Sep 16, 2022  |

This report and all of its attachments were approved and signed as outlined below:

**Tracey Vaughan, Chief Administrative Officer - Sep 16, 2022 - 1:18 PM**