



# Municipality of Port Hope

## Staff Report

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### Report Title: 2025-2028 Strategic Plan Process

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**Report to:** Committee of the Whole

**Date of meeting:** August 6, 2024

**Report Author:**

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**Department responsible:**

Office of the CAO

**Report Number:** CAO-02-24

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#### Recommended Action:

1. That Council support the development a Strategic Plan Process for the period of 2025-2028.
2. That Council direct staff to prepare and present a Strategic Planning Roadmap for the period of 2025-2028 at the September 10, 2024 Committee of the Whole Meeting.

#### Highlights:

- A strategic plan is the primary guiding document for the Municipality. It is supported by the municipal budget and guides the workplans of municipal staff and provides focus for all municipal representatives.
- The current strategic plan covered the term of 2019-2022.
- A few components of a strategic planning process occurred in 2023 with no formal adoption of the document. The last draft is attached to this report as Appendix A.
- Staff are recommending to undertake a fulsome strategic planning exercise for the term of 2025-2028. This period overlaps the term of Council to provide the opportunity for the strategic planning process to take place mid term.
- If Council supports the commencement of a new strategic planning process staff will provide a report at the September 10 meeting of the Committee of the Whole outlining a roadmap to success. The roadmap will further outline roles and responsibilities, communication and engagement efforts, participants, timelines etc.

#### Background:

The [2019-2022 Strategic Plan](#) was adopted in 2019 and identified the following priorities:

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1. Infrastructure Sustainability
2. Waterfront and Riverwalk Enhancement
3. Intentional Growth Planning
4. Multi-generations Community Opportunities
5. Affordable Housing
6. Corporate Efficiencies

Each of these priorities has been a focus of municipal budgeting and staffing resources over the course of the term and beyond and improvements have been seen in all of the identified areas. Based on the identified priorities it is the assumption of staff that some of the priorities will continue forward in the next plan albeit with a different focus or urgency.

### Current Term of Council

In January of 2023, the current Council held an open meeting with senior staff and an external consultant to review feedback heard during the campaign period and the earliest months of the 2022-2026 term. During this discussion several common themes emerged including, Housing, Economic Development, By-law and Governance and Climate/Sustainability. The consultant was asked to blend those identified themes with the previous plans priorities and present a combined list to begin community engagement. The following six pillars emerged from the process and were the basis of further engagement efforts:

1. More Homes – Take action to address the urgent need for more housing options for residents of all ages & incomes.
2. Strong Local Economy – Leverage our competitive advantages to facilitate business growth and attract new local jobs.
3. Welcoming and Livable Community – Pursue community projects and partnerships that enhance sense of belonging, improves happiness and ensure a high quality of life.
4. Healthy and Natural Environment – Continually strive to protect, conserve and enhance our natural environment while enhancing our capacity to mitigate and adapt to the impacts of climate change.
5. Safe and Well-Maintained Infrastructure – Embrace best practices in asset management to continuously maintain and improve our municipal infrastructure assets contributing to long-term sustainability.
6. Good Governance – Provide friendly, responsive, and citizen-focused services encouraging meaningful community engagement and demonstrating transparent decision-making, and provide a safe, inclusive and exceptional working environment for Staff and Council.

The survey utilized for community engagement surrounding the above list received 164 responses. Engagement efforts included website, boosted social media, newspaper, posters, TV screens at recreation facilities, Council & Mayor updates and physical interaction with the community by PRC staff and elected officials.

Following the community engagement an updated strategic planning document with the following identified pillars was presented to Council for their consideration:

1. Housing for All – Increase supply of sustainable, attainable and affordable housing to meet the needs of all residents of Port Hope.
2. Economic Growth and Prosperity – Diversify our tax base through economic development including growing business, attracting new jobs and strengthening tourism.
3. Welcoming, Inclusive & Livable Community- Enhance a sense of belonging and connection, improve happiness and ensure a high quality of life.
4. Climate Resiliency and Green Future – Strengthen capacity to mitigate and adapt to the impacts of climate change.
5. Sustainable Infrastructure – Embrace best practices in asset management to continuously maintain and improve the sustainability of our Municipal infrastructure.
6. Governance Excellence – Provide friendly, responsive and community focused services that advance community engagement, transparency and a safe, inclusive and exceptional working environment for Staff and Council.

Council chose not to adopt the draft Strategic Plan and referred the matter back to staff. No further movement on the process has been taken in recent months with the onboarding of a new Chief Administrative Officer and a recent re-organization of the corporate structure.

**Discussion:**

Strategic planning is vital in defining where the Municipality is going in the next three to five years. It is the foundational document that guides decision making and the allocation of resources. With the right strategic planning model and framework, opportunities can be uncovered, risks identified, and a plan will be created that fuels the municipalities success. Municipalities most commonly follow an Issue-based Strategic Planning Model that is goal based. It is the opinion of staff that a process is followed that is inclusive, comprehensive and in likeness of the current Council’s direction and the views of stakeholders.

Although some efforts were made towards updating the 2019-2022 strategic plan staff are recommending that the Municipality undertakes an inclusive and comprehensive approach to allow Council to have confidence during the adoption and implementation phase of the process.

Upon receiving Council’s support staff will present a strategic plan roadmap at the September 10, 2024, Committee of the Whole meeting that will include but not be limited to the following:

1. Process
  - a. Decide if the mission statement remains reflective or does it require change.

- b. Decide if the vision statement remains reflective or does it require change.
- c. Will values be added to the new strategic plan?
- 2. Stakeholder engagement
  - a. Public Survey that will provide analytics and be delivered in a manner that is statistically significant
  - b. Focus Groups with external and internal stakeholders and rightsholders
  - c. Workshop with representation from all levels of the municipal organizational chart
  - d. Workshop with Council
  - e. Workshop with Directors
- 3. Timelines
  - a. Touch-in points with Council to advise of how the process is progressing
  - b. Timing of draft
  - c. Timing of public consultation on draft
  - d. Timing of final presentation/adoption consideration
- 4. Roles & Responsibilities
  - a. Public Survey to be drafted by external consultant with the ability to provide data analytics
  - b. CAO to conduct focus groups with stakeholders, rightsholders and workshops with staff
  - c. External consultant to conduct workshop with Council

The report presented on September 10 will provide greater detail and a concise roadmap that will expand further on the above outline.

#### **Financial Considerations:**

The anticipated financial impact to conduct a new strategic planning process is estimated to be \$17,500.00 This will include external support to draft and analyze the public survey, external support for a full day workshop with Council. The estimate is also expected to fund communication and engagement costs which includes postage, printing and distribution.

Further details surrounding the Council workshop are to be determined.

#### **Communication and Public Engagement:**

The communication and public engagement approach will be included in the roadmap to be presented to Council on September 10, 2024, if a new strategic planning process is supported by Council.

#### **Conclusion:**

A solid foundation is the catalyst for educated and guided decision making. This transitions into efficient allocation of resources, fiscal responsibility and public facing accountability. For a municipality this foundation is in the form a robust, yet reasonable strategic plan. In order for Council and staff to have confidence in the adoption of the Plan and for that assurance to transfer to the implementation phase a comprehensive process is recommended.

**Attachments:**

1. Strategic Priorities previously considered by Council